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TEXTILE INDUSTRY IN THE UNITED KINGDOM, FRANCE, GERMANY, ITALY AND JAPAN

By

Ivan V. Emelianoff

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Special Studies Section

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FOREWORD

This study of "The Textile Industry in the United Kingdom, France, Germany, Italy and Japan", has been prepared by Mr. Ivan V. Emelianoff of the Special Studies Section, Mr. G. C. Gamble in general charge, as a joint project with the Textile Fabrics Unit of the Industry Studies Section.

This material is in reality a preliminary draft, although limitations of personnel prevent further work being done. It is made available because of its significance in connection with the major study of the Textile Industry in the United States.

At the back of the report a brief statement of the studies undertaken will be found.

L. C. Marshall
Director, Division of Review

February, 1936

I. TEXTILE INDUSTRY IN THE UNITED KINGDOM

A. Textile Industry in the Manufacturing System of the Country.

Since remote times the United Kingdom has held and still retains the leading-position in the world's textile production and trade.

1. The relative importance of the Textile Industry in the economic structure of the United Kingdom is best illustrated by:

(a) The volume of employment, which amounted to 7.4 per cent in 1911 and 6.2 per cent in 1931 of the total number of gainfully occupied persons in the United Kingdom; the Textile Industry being second to only the metal-machines group when measured by volume of employment.

(b) Its productive capacity, which is approximately one-third of the world's total in number of spindles and one-fifth of the number of looms in the cotton branch - the most important section of industry.

(c) Its place in foreign trade - where the value of imported textile goods averaged, during 1930-1933, 17.1 per cent of the total value of British imports. Textile exports amounted to 36.5 per cent of the value of total British exports for the same period.

2. The cotton and woolen branches are the most important of the textile trades in Great Britain, they absorb roughly two-thirds of the total volume of employment in the Textile

Industry and contribute approximately four-fifths of the total value of the British foreign trade in textiles.

3. England depends upon the imported raw textile materials in all textile trades either entirely, as in the case of cotton, silk, jute and hemp or preeminently as in the case of the wool industry where the home grown wool fills 8 per cent only of the total need of the British Wool Industry.

4. The British imports of textiles consist mainly of raw materials which averaged 75 per cent of total textile imports during 1920 to 1933; and exports, mainly of piece goods. Piece goods averaged 83 per cent of all textile exports for the period 1930 to 1933 and yarns 13.7 per cent.

5. In the most important branch of the British Textile Industry - the cotton trade - since the War about two-thirds of the total output of yarns and over six-sevenths of the output of fabrics has been produced for export.

6. The principal countries exporting cotton to England are the United States and Egypt which supply about three-fourths of the total raw cotton consumed in Great Britain. About four-fifths of the British consumption of raw wool is imported from the British Dominions (Australia, New Zealand, South Africa and British India).

The British exports in both these branches have always been world-wide.

B. Organization of the British Textile Industry.

1. The British Textile Industry in almost all its branches is highly sectionalized and is lacking in industrial integration. Firms of different types and of varying sizes exist in the Cotton Industry of England. The outstanding characteristic of her wool industry is the prevalence of the small unit. Two sections of the Textile Industry, however - the finishing trades and the rayon branch - are highly concentrated and represent strong monopolies.

2. The labor conditions in the British Textile Industry are not subject to any statutory regulations. The normal hours of work prescribed by the National Agreement of the industry and labor in 1919 were forty-eight hours per week. After many attempts by the manufacturers to extend the working time to fifty-two and one half hours weekly during 1928-1932, the original normal week of forty-eight hours was restored by the National Agreement and is still in force.

3. No multiple shift system is allowed in Lancashire - a very small group of the employees, however, (women and juniors- total number about 20,000 persons) is working in the rayon industry on a two shift basis.

4. There are numerous cartels, "agreements" and "understandings" among the British textile manufacturers in almost all sections of the industry. All these organizations, however, are prominently unstable and inefficient, due to (a) the high sectionalization of the industry (b) the wide diversity of the units and (c) the

partial character of the organizations. Hence, with the exception of the vertically integrated and actually monopolistic finishing and rayon trades the British Textile Industry as a whole still remains substantially competitive.

5. The price movements in the British textiles perfectly coincide with the trends traceable in the changes of the foreign trade of Lancashire, in the volume of employment and in the state of the industrial equipment employed in the post-war period. After the boom - the p r i c e boom of 1920 - there followed a decline in textile prices with a sharp drop after 1925; after the slight detention of the decline under the influence of the 1928-1929 industrial boom the fall in prices of textile goods was precipitate and uninterrupted until 1931. The course of price trends in textiles was not identical. As an illustration prices in jute and hemp branches vary greatly when compared with those of cotton, wool and linen.

C. Government and Organized Industry Measures Relating to the Textile Industry.

1. A protective policy started in England in 1915 and was finally adopted in 1932. The restriction of imports by the protective tariffs, however, could not influence materially the imports of textiles, since three-fourths of the imported textiles were raw materials, also the imported semi-finished and finished textile goods did not compete directly with the Lancashire industry.

2. The preferential tariff arrangements adopted in 1932 (Ottawa Conference) were, according to the prevailing opinion among British manufacturers, more beneficial to the Dominions than to England, though the volume of business within the Empire in 1933 increased slightly, while the trade of England with the Foreign countries was still in recession. In 1934 the growth of the Imperial trade was more rapid than that with foreign countries.

3. The artificial silk section is the only branch of the Textile Industry in the United Kingdom regulated by the mighty international cartel. In this Courtauld Company has been from the start one of the most influencial participants. Courtauld Company controls over four-fifths of the rayon production of the United Kingdom. The lack of vertical integration and of cartellization on a national scale in all other textile branches prevents a possibility of international industrial agreements.

4. The restoration of the gold standard in England in 1925 aggravated markedly the conditions of foreign trade in the Textile Industry and was considered to be a powerful factor at that critical moment by the Lancashire manufacturers. The desertion of the gold standard in 1931 did not act as a stimulus to expansion of foreign trade, since the other countries followed England in devaluation of their currencies and the chief British competitor - Japan- depreciated her yen still more and

became an even greater competitor than before. Thus, the temporary benefits from depreciation were soon easily destroyed by counter-attacks.

6. Among the measures intended to adjust production to demand, besides the established normal working week of 48 hours (See B-2) and the one-shift-system principle (See B-3) there were numberless attempts in the United Kingdom to regulate Industry through the quota agreements, price fixing, terms of sale and minimum price arrangements. However, none of these attempts could justify the expectations, and the cartels although created under the pressure of a most dire necessity could not exist due to the high dispersion, extreme sectionalism and wide diversity of the business units within the industry.

6. The most recent and far reaching measure of the adjustment of production to demand in the United Kingdom is the planned scrapping of 10,000,000 spindles by the Cotton Industry with compensation for the scrapped (and sealed) spindles. This plan is still in need of necessary approval by the Industry (90 per cent of manufacturers must adopt it). However, this is only a palliative measure aiming to eliminate the gigantic surplus of productive capacity in order to assure a full utilization of the remaining industrial equipment and in the long run means an economic retreat of the British Textile Industry before her powerful rival Japan.

APPENDIX I

RAW COTTON RETAINED IN THE UNITED KINGDOM

(In Thousands of Pounds)

Years	Amount Imported	Amount Re-exported	Amount Retained
1913	2,174,229.6	257,645.2	1,916,654.7
1920	1,948,666.7	255,918.9	1,692,747.8
1921	1,203,528.8	156,516.1	1,047,013.7
1922	1,490,370.7	88,488.1	1,401,882.6
1923	1,357,407.7	113,459.2	1,244,948.5
1924	1,633,325.0	144,356.2	1,488,968.8
1925	1,960,008.0	140,527.7	1,819,540,3
1926	1,802,426.5	148,249.1	1,654,177.4
1927	1,636,513.4	134,304.4	1,502,209.0
1928	1,569,658.6	70,509.5	1,499,149.1
1929	1,609,375.6	80,308.1	1,529,067.5
1930	1,275,784.1	74,466.4	1,201,317.7
1931	1,153,961.5	42,428.4	1,111,533.1
1932	1,326,069.0	53,830.8	1,272,238.2
1933	1,487,027.6	55,581.9	1,431,435.7
-	-	-	-

SOURCE: Statistical abstract for the United Kingdom. London, 1935

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VALUE OF IMPORTS OF TEXTILE GOODS IN THE UNITED KINGDOM

(In thousands of pounds sterling)

Year	Total Imports	Total Textiles	Raw Cotton	Raw Wool	Other Textile Raw Materials	Cotton-Wool Yarn	Other Textile Goods
1913	768,735	165,284	70,506	34,226	20,491	9,365	30,616
1920	1,932,649	456,997	256,524	87,624	37,114	10,607	65,128
1921	1,885,500	164,894	73,290	41,551	11,610	5,973	32,470
1922	1,003,099	204,919	87,276	58,851	14,707	7,478	36,607
1923	1,096,226	205,549	93,389	46,677	12,849	8,925	43,709
1924	1,277,439	268,187	121,427	69,902	17,645	9,927	49,279
1925	1,320,715	276,395	125,534	71,797	19,905	8,706	50,451
1926	1,241,361	210,588	84,221	62,587	15,414	8,443	39,923
1927	1,218,341	196,684	67,401	59,774	18,294	9,312	41,903
1928	1,195,598	208,883	80,535	60,496	15,704	9,758	42,390
1929	1,220,765	204,319	77,147	59,767	16,072	10,319	41,014
1930	1,043,975	143,552	44,887	42,474	10,827	8,770	36,595
1931	867,253	108,600	27,092	32,715	7,649	7,812	33,331
1932	701,670	85,231	31,023	32,483	7,085	1,364	13,276
1933	675,016	93,499	36,570	35,613	8,053	1,421	11,841

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

APPENDIX 3

PERCENT OF VALUE OF TEXTILE GOODS IMPORTED BY THE UNITED KINGDOM

Years	Total Imports	Total Textile Imports	Textile Imports: Cotton Yarn	Textile Imports: Wool Yarn	Textile Imports: Other Yarns	Manufactured Textiles
1913	100.0	21.5	9.9	4.9	2.6	4.1
1920	100.0	23.6	13.4	4.8	1.9	3.5
1921	100.0	15.2	7.1	4.1	1.1	2.9
1922	100.0	20.4	9.1	6.2	1.4	3.7
1923	100.0	18.7	9.0	4.6	1.1	3.0
1924	100.0	21.0	10.0	5.0	1.4	4.6
1925	100.0	20.9	9.9	5.7	1.5	3.8
1926	100.0	17.0	7.1	5.3	1.2	3.4
1927	100.0	16.1	6.0	5.2	1.5	3.4
1928	100.0	17.4	7.2	5.4	1.3	3.5
1929	100.0	16.7	6.8	5.3	1.3	3.3
1930	100.0	13.8	4.8	4.4	1.0	3.6
1931	100.0	12.6	3.7	4.1	0.9	3.9
1932	100.0	12.1	4.6	4.6	1.0	2.7
1933	100.0	13.8	5.6	5.3	1.2	1.7

SOURCE: Statistical Abstracts for the United Kingdom, London.

APPENDIX 4

NUMBER OF EMPLOYEES IN TEXTILE INDUSTRIES OF THE UNITED KINGDOM

(In Thousands)

Year	All Industries	TEXTILE INDUSTRIES						
		Total	Cotton	Woolen and Worsted	Flax, Hemp, Jute, Etc.	Dyeing & Bleaching Products	Silk	Other Textile Industries
1881	12,739	1,191	520	252	85	66	64	204
1891	14,500	1,253	652	275	93	66	53	114
1901	16,312	1,169	544	235	99	79	37	175
1911	18,354	1,359	646	261	105	111	33	203
1921	19,357	1,293	621	260	88	117	34	173
1931	21,055	1,317	591	248	86	116	72	204

SOURCE: Statistical Abstract for The United Kingdom, London, 1935.

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PERCENT OF UNEMPLOYED INSURED WORKERS IN PRINCIPAL TEXTILE INDUSTRIES OF THE UNITED KINGDOM

Year	Cotton	Woolen Worsted	Silk & Rayon	Artificial Silk Yarn	Linen	Jute	Hemp, Rope, etc.	Hosiery	Lace	Carpets	Other Textiles	Finishing
1923		9.5	6.9		19.8	11.1	15.0	7.9	25.5	5.2	14.4	11.9
1924	15.9	7.3	3.9		11.9	9.3	13.5	5.7	18.7	6.2	10.7	11.8
1925	11.4	21.7	6.2		38.1	33.1	18.2	10.0	19.5	11.2	11.6	14.4
1926	28.3	23.5	11.7		29.4	56.9	19.5	15.8	21.4	27.9	16.5	21.6
1927	9.4	9.5	6.6		10.5	9.4	9.5	6.2	7.1	7.1	8.1	11.1
1928	15.2	15.1	5.6		31.3	8.5	13.3	0.8	8.7	9.2	8.5	14.3
1929	14.4	15.8	7.7		14.7	12.2	12.8	6.1	9.2	6.1	8.5	15.8
1930	44.7	26.1	23.6	20.6	36.1	51.0	20.8	15.9	16.9	14.7	18.1	32.1
1931	42.5	36.3	31.3	26.8	32.4	77.1	28.0	21.6	23.4	24.0	22.9	36.8
1932	33.0	27.2	20.4	16.1	40.8	78.0	27.2	14.5	18.6	10.8	17.6	28.3
1933	26.9	13.0	15.7	10.6	21.1	54.2	20.9	10.5	15.6	10.4	13.7	24.5
1934	25.6	24.3	13.4	11.2	17.8	72.6	18.9	12.4	13.8	5.9	11.4	22.9

SOURCE: Statistical Abstracts for the United Kingdom - 1935.

APPENDIX 6

NUMBER OF COTTON SPINDLES CLASSIFIED BY PRINCIPAL COUNTRIES

(In thousands)

		1913	1930	1931	1932	1933
	All Countries	143,449	164,108	162,278	161,002	157,755
	Europe	99,505	103,838	102,712	101,417	98,140
I.	Great Britain	55,652	55,207	54,246	51,891	49,001
	France	7,400	10,250	10,350	10,144	10,144
	Germany	11,186	10,070	10,591	10,233	9,850
	Russia	7,688	7,612	7,612	9,200	9,200
	Italy 1/	4,600	5,342	5,397	5,384	5,338
	Czechoslovakia		3,636	3,638	3,622	3,627
	Belgium	1,492	2,172	2,164	2,156	2,087
	Spain	2,000	1,875	2,070	2,070	2,070
	Poland	1,322	1,554	1,555	1,706	1,818
	Switzerland	1,398	1,446	1,381	1,346	1,303
	Netherland	479	1,167	1,215	1,213	1,224
	Austria 2/	4,909	817	768	767	758
	Sweden	534	617	613	596	595
	Portugal	480	503	503	453	446
	Finland	222	262	262	263	263
	Hungary 1/		199	190	217	258
	Denmark	89	99	94	100	100
	Norway	74	60	58	56	58
II.	Asia	9,393	19,808	20,491	21,395	22,300
	China	1,009	3,829	4,054	4,285	4,585
	India	6,084	8,907	9,125	9,312	9,506
	Japan	2,300	7,072	7,312	7,798	8,209
III.	America	34,260	38,850	37,433	36,474	35,586
	United States	31,505	34,031	32,676	31,709	30,894
	Canada	855	1,277	1,276	1,245	1,240
	Brazil	1,200	2,775	2,690	2,690	2,620
	Mexico	700	767	791	830	832
IV.	Other Countries	219	1,562	1,642	1,716	1,729

SOURCE: International Cotton Bulletin

Notes: 1/ Included with Austria

2/ Including Czechoslovakia and Hungary.

APPENDIX 7

NUMBER OF COTTON LOCKS CLASSIFIED BY PRINCIPAL COUNTRIES

	1913	1930	1933
All countries			
Europe	1,875,103	1,914,326	1,846,680
England	805,452	692,899	587,964
Russia	213,179	159,100	250,000
Germany	230,200	224,077	222,500
France	108,000	200,100	198,200
Italy	140,000	146,500	146,500
Czechoslovakia 1/			
		125,000	104,591
Spain	55,000	81,035	66,586
Netherland	39,800	54,839	55,960
Belgium	24,000	54,385	54,800
Poland	31,000	41,086	38,611
Switzerland	21,555	23,835	23,096
Sweden	12,442	18,643	16,103
Austria 2/	170,000	13,915	13,078
Hungary 1/			
		12,060	12,500
Asia	120,622	400,534	515,469
Japan	20,634	188,466	277,343
India	94,136	179,682	189,678
China	5,582	29,582	44,000
America	804,080	842,184	766,065
United States	696,387	698,955	613,633
Brazil	50,000	77,946	81,892
Mexico	27,019	31,440	33,197
Canada	30,674	21,618	25,487
Other Countries	7,049	1,734	1,755

SOURCE: International Cotton Bulletin.

Notes: 1/ Included with Austria.
2/ Includes Czechoslovakia and Hungary.

APPENDIX 8

ESTIMATED NUMBER OF INSURED EMPLOYEES IN PRINCIPAL TEXTILE INDUSTRIES OF THE UNITED KINGDOM. 1923 to 1934

Years	Cotton	Wool	Silk and Rayon Weaving	Rayon Yarn	Linen	Jute	Hemp	Hosiery	Lace	Carpets	Text. not Specified	Finishing
1923	567,650	269,420		37,300	81,770	41,000	19,930	89,880	21,220	25,380	42,910	114,950
1924	572,420	261,630		41,490	83,170	41,230	20,780	93,350	20,350	27,150	43,840	120,670
1925	573,330	256,120		46,550	86,510	42,220	21,180	97,530	19,500	26,070	45,120	118,200
1926	575,100	253,550		50,830	89,510	41,630	19,680	97,320	18,880	25,980	44,440	118,140
1927	570,110	249,180		55,070	85,130	39,900	19,530	101,190	18,170	24,780	44,020	120,960
1928	553,970	242,590		70,270	81,210	39,630	18,770	102,870	17,120	24,400	44,590	116,670
1929	554,790	239,030		73,860	79,560	39,490	19,010	105,780	16,920	25,270	45,480	116,230
1930	564,090	240,460	49,460	26,640	81,430	41,290	19,920	107,950	16,760	26,090	45,660	116,900
1931	550,110	238,870	45,020	27,490	78,210	40,150	19,040	112,240	17,200	26,290	47,180	115,600
1932	517,950	233,610	43,950	26,370	74,560	37,190	18,510	114,200	16,620	27,360	45,890	112,090
1933	499,930	230,880	45,130	24,530	72,860	34,950	18,150	114,050	16,350	27,710	47,800	113,140
1934	467,440	229,590	a/	a/	a/	a/	a/	a/	a/	a/	a/	a/

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935

a/ Data not available.

Appendix 9

VALUE OF TOTAL FOREIGN TRADE AND TEXTILE IMPORTS AND EXPORTS OF THE UNITED KINGDOM

(In Thousands of Pounds Sterling)

Years	Imports		Exports		Textiles' Percentage of Total	
	Total	Textiles	Total	Textiles	Imports	Exports
1913	768,734.7	165,249.1	525,293.6	199,803.5	21.4	38.1
1920	1,932,648.9	456,997.1	1,334,469.3	628,909.4	23.6	47.1
1921	1,085,500.1	164,895.3	703,399.5	271,602.2	15.2	38.6
1922	1,003,098.9	204,920.1	719,517.4	293,368.2	20.4	40.8
1923	1,096,226.2	205,280.1	767,257.8	294,646.5	18.7	38.6
1924	1,227,439.1	268,186.0	800,966.8	330,714.4	21.8	41.3
1925	1,320,715.2	276,394.9	773,380.7	318,397.1	20.9	41.2
1926	1,241,361.3	210,588.0	653,046.9	260,856.1	17.0	40.0
1927	1,218,341.2	195,451.6	709,081.3	262,908.0	16.1	37.1
1928	1,195,598.4	208,890.6	723,579.1	261,749.8	17.4	36.1
1929	1,220,765.3	204,319.5	729,349.3	246,111.5	16.8	33.7
1930	1,043,975.3	143,552.3	570,755.4	160,060.5	13.7	28.1
1931	867,252.6	108,599.5	390,621.6	108,716.8	12.5	27.8
1932	701,670.1	85,231.2	365,024.0	112,599.2	12.1	30.8
1933	675,016.1	93,498.5	367,909.1	110,242.1	13.7	30.0
Average 1920 - 1933	-	-	-	-	17.1	36.5

SOURCE: Statistical Abstract for the United Kingdom - 1913,1920-1933.

APPENDIX 10

PERCENT OF TEXTILE GOODS EXPORTED FROM THE UNITED KINGDOM, CLASSIFIED BY KIND.

Year	Cotton	Wool	Silk	Rayon	Linen	Jute	Others	Total
1913	63.3	19.9	1.1	--	4.7	1.9	9.1	100.0
1920	64.3	22.7	0.8	0.5	3.8	1.5	6.4	100.0
1921	66.1	21.9	0.8	0.6	3.8	1.1	5.7	100.0
1922	64.2	22.3	0.7	0.9	4.3	1.3	6.3	100.0
1923	60.8	24.2	0.7	1.2	4.3	1.3	7.5	100.0
1924	60.8	23.8	1.6	1.3	4.5	1.2	7.8	100.0
1925	63.1	21.6	0.6	1.7	3.6	1.7	7.7	100.0
1926	59.6	22.4	0.7	2.7	4.2	1.8	8.6	100.0
1927	57.4	25.0	0.7	2.9	4.2	1.7	8.1	100.0
1928	56.0	25.0	0.9	3.9	4.0	1.8	8.4	100.0
1929	55.4	25.2	0.9	3.4	4.2	2.2	8.7	100.0
1930	55.1	25.7	0.9	3.7	5.2	1.5	7.9	100.0
1931	52.3	25.8	1.0	3.1	5.4	1.3	11.1	100.0
1932	56.2	24.1	0.9	3.5	5.1	1.2	9.0	100.0
1933	53.9	27.4	0.8	3.4	5.9	1.4	7.2	100.0
1920-1933 Av.	58.9	24.1	0.8	2.3	4.5	1.5	7.9	100.0

SOURCE: Statistical abstracts for the United Kingdom, London, 1935.

VALUE OF TEXTILE GOODS EXPORTED BY THE UNITED KINGDOM CLASSIFIED BY KIND

(In thousands of pounds Sterling)

Years	Total	Cotton	Wool	Silk	Rayon	Linen	Jute	Others
1913	199,803.5	126,467.2	39,727.3	2,157.5	- -	9,464.4	3,847.1	18,140.0
1920	628,909.4	404,493.8	142,838.2	5,194.5	3,006.7	23,871.4	9,424.0	40.030.8
1921	271,602.2	179,393.3	59,379.0	2,282.4	1,705.9	10,338.7	3,080.0	15,422.9
1922	293,368.2	188,388.4	65,425.9	2,292.7	2,624.3	12,532.8	3,813.0	18,291.1
1923	294.646.5	179,044.8	71,426.7	2,042.7	3,459.8	12,631.0	3,853.4	22,188.1
1924	330,714.4	201,017.7	78,565.9	2,186.6	4,310.2	14,746.4	4,135.6	25,752.0
1925	318,397.1	201,173.9	68.666.8	1,842.1	5,364.2	11,483.0	5,361.6	24,505.5
1926	260,856.1	155,382.4	58,426.3	1,953.5	7,114.8	10,832.0	4,612.6	22,534.5
1927	262,908.0	150,013.0	65,745.0	2,426.7	7,596.7	11,022.4	4,452.8	21,651.4
1928	261,749.8	146,684.3	65,539.3	2,406.1	10,057.8	10,442.0	4,773.3	21,846.4
1929	246,111.5	136,600.0	61,984.4	2,167.9	8,388.2	10,342.9	5,285.6	21,332.5
1930	160,060.5	88,186.7	41,076.8	1,555.6	5,934.9	8,248.3	2,363.5	12,694.7
1931	108,716.8	56,929.6	28,017.3	1,037.6	3,363.2	5,930.6	1,424.3	12,014.2
1932	112,599.2	63,342.7	27,114.6	1,023.6	3,940.8	5,801.8	1,359.6	10,016.1
1933	110,242.1	59,397.8	30,228.2	855.9	3,796.5	6,475.5	1,511.5	7,976.7

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

APPENDIX 12

PERCENT OF VALUE OF TEXTILE GOODS IMPORTED BY THE UNITED KINGDOM, CLASSIFIED BY KIND 1/

Year	Total	Cotton	Wool	Silk	Flax	Hemp	Jute	Rayon
1913	100.0	50.2	27.4	9.9	2.5	2.5	7.4	--2/
1920	100.0	59.8	22.6	9.0	1.6	2.4	4.5	0.1
1921	100.0	49.4	30.4	12.3	1.9	1.5	3.8	0.7
1922	100.0	47.3	33.8	11.6	1.6	1.3	3.2	1.2
1923	100.0	51.0	23.6	12.0	1.2	1.5	3.6	2.1
1924	100.0	49.7	31.5	10.1	1.6	1.5	3.6	2.0
1925	100.0	49.7	31.3	8.8	1.4	1.6	4.7	2.5
1926	100.0	44.7	36.5	8.9	1.6	1.6	4.7	2.0
1927	100.0	40.1	38.9	9.2	1.6	1.9	4.8	3.5
1928	100.0	44.1	37.2	7.9	1.4	1.5	4.5	3.4
1929	100.0	43.5	37.2	7.4	1.6	1.5	5.0	3.8
1930	100.0	38.4	39.5	8.9	1.9	1.6	4.4	5.3
1931	100.0	33.7	42.4	8.9	1.5	1.5	4.5	7.5
1932	100.0	38.9	41.1	6.1	2.1	1.3	5.0	5.5
1933	100.0	41.8	41.2	4.8	1.9	1.4	4.3	4.6
1920 - 1933av.	100.0	45.2	34.8	9.0	1.7	1.7	4.4	3.2

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

1/ "Goods" includes raw, semifinished and finished goods.

2/ No data available.

APPENDIX 13

VALUE OF TEXTILE GOODS IMPORTED BY THE UNITED KINGDOM CLASSIFIED BY KIND 1/

(In thousands of pound Sterling)

	Total	Cotton	Wool	Silk	Flax	Hemp	Jute	Rayon
1913	165,249	82,950	45,376	16,411	4,180	4,195	12,137	2/
1920	456,997	273,292	103,097	40,977	7,375	11,042	20,574	640
1921	164,895	81,412	50,160	20,193	3,124	2,520	6,286	1,200
1922	204,920	96,971	69,225	23,678	3,328	2,625	6,536	2,559
1923	205,280	104,644	58,502	24,507	2,652	3,132	7,437	4,406
1924	268,186	133,262	84,549	27,015	4,315	4,194	9,335	5,515
1925	276,394	137,293	86,543	24,311	3,768	4,465	13,114	6,900
1926	210,588	94,146	76,806	18,856	3,334	3,292	9,935	4,219
1927	195,451	78,514	76,086	18,010	3,188	3,870	9,659	6,124
1928	208,890	92,153	77,812	16,367	2,899	3,192	9,397	7,070
1929	204,319	88,716	76,042	15,075	3,325	3,139	10,208	7,814
1930	143,552	55,166	56,733	12,736	2,662	2,357	6,352	7,545
1931	108,599	36,605	46,070	9,632	1,589	1,642	4,943	8,118
1932	85,231	33,149	35,012	5,168	1,696	1,160	4,288	4,758
1933	93,498	39,075	38,569	4,464	1,844	1,355	3,987	4,203

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

1/ Raw, semifinished, and finished goods.
2/ No data available.

APPENDIX 14

PERCENT OF VALUE OF TEXTILE RAW MATERIALS IMPORTED BY THE UNITED KINGDOM CLASSIFIED BY KIND

Year	Total Raw Materials	Cotton	Wool	Mohair	Silk	Flax	Hemp	Jute
1913	100.0	56.4	27.3	1.3	1.0	3.3	3.3	7.4
1920	100.0	67.5	22.9	0.3	1.0	1.9	2.9	3.4
1921	100.0	58.0	32.7	0.9	0.7	2.4	1.9	3.4
1922	100.0	54.3	36.6	1.3	1.5	2.1	1.6	2.7
1923	100.0	61.1	30.5	1.1	1.1	1.7	2.0	2.5
1924	100.0	58.1	33.5	0.9	0.8	2.1	2.0	2.6
1925	100.0	57.9	32.1	0.7	0.8	1.8	2.6	4.0
1926	100.0	51.9	38.5	0.6	1.2	2.1	2.1	3.6
1927	100.0	46.4	41.0	1.2	1.3	2.2	2.7	5.2
1928	100.0	51.4	38.6	0.9	1.2	1.9	2.0	4.0
1929	100.0	50.4	39.1	0.7	1.2	2.2	2.1	4.3
1930	100.0	45.8	43.3	1.0	1.5	2.7	2.4	3.3
1931	100.0	40.2	48.4	1.0	1.9	2.3	2.4	3.8
1932	100.0	43.9	46.0	0.6	1.9	2.4	1.7	3.5
1933	100.0	45.6	44.4	1.1	1.7	2.3	1.7	3.2
1920-1933av.	100.0	52.3	37.7	0.9	1.3	2.2	2.1	3.5

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935

VALUE OF TEXTILE RAW MATERIALS IMPORTED BY THE UNITED KINGDOM
CLASSIFIED BY KIND

APPENDIX 13

(In thousands of Pound Sterling)

Year	Total Raw Materials	Cotton	Wool	Mohair	Silk	Flax	Hemp	Jute
1913	125,284.0	70,570.5	34,226.1	1,574.2	1,295.7	4,180.1	4,191.8	9,246.6
1920	381,261.2	256,573.5	87,624.0	1,529.7	4,067.6	7,374.8	11,041.8	13,099.7
1921	126,450.7	73,290.2	41,550.9	1,240.3	949.5	3,124.2	2,519.8	3,775.8
1922	160,833.2	87,275.7	58,850.7	2,133.0	2,346.3	3,327.6	2,624.7	4,275.2
1923	152,915.2	93,389.3	46,676.9	1,616.3	1,609.1	2,652.1	3,131.8	3,839.4
1924	208,972.4	121,426.6	69,901.7	1,863.8	1,807.6	4,314.9	4,194.4	5,463.3
1925	217,235.5	125,533.6	71,797.3	1,373.1	1,669.8	3,763.5	4,464.8	8,628.5
1926	162,222.0	84,221.4	62,586.6	954.2	2,022.3	3,333.6	3,291.9	5,812.0
1927	145,468.7	67,400.5	59,774.1	1,851.5	1,828.5	3,188.1	3,869.9	7,526.1
1928	156,734.9	80,555.4	60,496.0	1,419.0	1,829.9	2,899.5	3,191.6	6,293.5
1929	152,985.8	77,147.3	59,766.8	1,123.2	1,901.0	3,325.1	3,139.4	6,583.0
1930	98,188.2	44,886.6	42,474.2	991.7	1,515.4	2,662.0	2,357.5	3,300.8
1931	67,515.8	27,092.1	32,715.1	630.1	1,253.7	1,588.6	1,642.5	2,546.7
1932	70,589.8	31,022.5	32,482.7	401.9	1,372.5	1,695.9	1,159.9	2,453.9
1933	80,235.6	36,570.0	35,612.6	839.8	1,338.4	1,844.4	1,365.1	2,625.3

SOURCES: Statistical Abstracts for the United Kingdom, London, 1935.

APPENDIX 16

COTTON IMPORTS OF THE UNITED KINGDOM CLASSIFIED BY PRINCIPAL COUNTRIES

(In thousands of pounds)

Years	U.S.A.	Egypt	Peru	Brazil	Other foreign countries	British colonies	1/ Total
1913	1,584,769.5	402,669.4	38,406.0	61,803.6	14,736.1	71,915.0	2,174,299.6
1920	1,417,311.5	281,727.8	65,579.2	23,465.7	39,987.1	402,323.2	1,948,666.7
1921	815,017.4	231,271.5	59,692.0	16,361.8	28,883.5	289,628.1	1,203,582.8
1922	943,330.5	316,198.5	77,303.4	36,909.1	36,088.7	396,739.0	1,490,370.7
1923	693,771.3	349,352.6	77,911.6	21,855.5	49,935.6	164,881.1	1,357,407.7
1924	971,192.5	345,121.2	76,620.5	17,233.4	48,228.1	174,929.3	1,633,325.0
1925	1,254,461.8	305,190.9	84,753.4	37,903.3	69,135.8	208,622.8	1,960,068.0
1926	1,096,796.5	313,976.9	87,497.6	32,971.5	77,817.7	193,366.3	1,802,426.5
1927	973,829.7	316,523.5	107,539.3	21,842.1	62,080.2	154,698.6	1,636,513.4
1928	896,834.9	304,216.6	80,547.1	14,347.8	76,999.2	196,713.0	1,569,658.6
1929	866,452.3	295,910.6	80,833.1	67,217.7	81,782.4	217,179.5	1,609,375.6
1930	610,727.8	210,743.8	84,027.2	70,073.3	86,457.2	213,754.8	1,275,784.1
1931	463,743.6	255,850.2	66,317.2	37,547.6	176,647.9	153,855.0	1,153,961.5
1932	766,477.0	240,675.7	65,994.3	1,641.5	106,670.1	144,610.4	1,326,069.0
1933	803,153.3	319,878.0	80,078.2	13,947.5	61,682.9	208,287.7	1,487,027.6

SOURCE: Statistical Abstracts for the United Kingdom, 1935.

1/ Includes linters and re-exported cotton.

WOOL IMPORTS BY THE UNITED KINGDOM CLASSIFIED BY PRINCIPAL COUNTRIES 1/ APPENDIX 17

(In thousands of pounds)

Years	Australia	New Zealand	So. Africa	Br. India	So. America	Others	Total
1913	265,078	181,181	133,224	54,946	100,479	71,482	806.390
1920	508,579	154,196	57,684	41,918	74,967	39,599	876,943
1921	311,075	148,315	162,405	34,657	90,526	26,089	763,067
1922	457,864	304,675	146,909	55,458	103,696	42,579	1,111, 481
1923	276,301	181,101	112,438	50,271	80,231	45,307	745,649
1924	228,834	178,630	128,056	56,098	108,161	77,221	777,000
1925	225,143	172,492	140,583	59,479	85,182	49,496	732,375
1926	304,415	184,188	147,741	41,488	98,918	39,867	816,617
1927	237,629	192,428	159,007	55,234	127,082	57,069	828,449
1928	222,930	182,303	162,362	55,124	110,275	51,154	784,148
1929	269,899	193,986	167,454	53,929	83,046	50,390	818,704
1930	257,040	174,666	158,235	34,263	126,529	35,719	786,452
1931	289,970	188,382	131,015	35,806	165,551	42,827	852,551
1932	302,005	201,055	211,276	34,568	138,943	34,065	921,912
1933	308,677	243,749	174,258	40,643	136,159	53,308	956,794

SOURCE: Statistical Abstracts for the United Kingdom, 1935.

1/ Includes Sheep, Lamb, Alpaca and Llama Wool.

APPENDIX 18

VALUE OF TEXTILE GOODS EXPORTED BY THE UNITED KINGDOM

(In Thousands of Pound Sterling)

Years	Raw Materials	Semi-finished Goods	Piece Goods	Total
1913	3,987.3	24,973.4	170,842.8	199,803.5
1920	10,742.7	69,414.4	348.752.3	328,909.4
1921	5,017.6	34,100.4	232,484.2	271,602.2
1922	8,215.8	39,973.3	245,176.1	293,363.2
1923	10,451.3	33,402.5	330,792.7	294,646.5
1924	12,024.1	43,306.9	374,383.4	330,714.4
1925	11,498.9	45,033.4	261,874.8	318,397.1
1926	8,154.0	32,407.5	220,294.6	260,856.1
1927	10,206.9	37,747.5	214,953.6	262,908.0
1928	10,014.8	36,945.9	214,789.1	261,749.8
1929	9,351.9	35,103.8	201,655.8	246,111.5
1930	4,714.2	23,404.4	131,941.9	160,060.5
1931	3,198.5	17,244.9	88,273.4	108,716.8
1932	3,607.1	17,038.2	91,953.9	112,599.2
1933	5,109.9	17,439.5	87,692.7	110.242.1

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

APPENDIX 19

EXPORTS OF COTTON GOODS BY THE UNITED KINGDOM
1913-1934

(In Thousands)

Years	YARN		FABRICS	
	Amount in Pounds	Index 1913-100	Amount in Linear Yards	Index 1913-100
1913	210,099.0	100.0	7,075,252.0	100.0
1914	178,527.8	85.0	5,735,854.7	81.9
1915	188,178.7	90.0	4,748,904.6	67.7
1916	172,192.8	82.0	5,255,503.9	75.0
1917	133,153.5	63.4	4,979,076.9	71.1
1918	101,793.7	48.5	3,695,772.1	52.7
1919	162,655.5	77.4	3,528,756.5	50.4
1920	147,432.4	70.2	4,760,000.0	68.0
1921	145,894.9	69.5	3,038,246.2	43.4
1922	201,953.0	96.1	4,312,667.0	61.6
1923	145,017.4	69.1	4,323,865.6	61.7
1924	163,053.4	77.6	4,585,096.4	65.4
1925	189,531.2	90.7	4,636,720.2	66.1
1926	168,526.8	80.2	3,922,796.7	56.0
1927	200,464.7	95.4	4,189,109.6	59.9
1928	169,206.9	80.6	3,968,198.3	56.7
1929	166,637.7	79.3	3,764,852.4	52.3
1930	136,987.5	65.0	2,490,549.4	35.6
1931	133,516.1	63.6	1,790,157.0	25.6
1932	141,662.7	67.4	2,302,612.5	32.9
1933	135,111.4	64.3	2,116,720.0	30.1
1934	130,425.7	62.0	2,067,421.0	29.4

SOURCE: International Cotton Bulletin

APPENDIX 30

EXPORTS OF WOOLEN-WORSTED GOODS BY THE UNITED KINGDOM
(In thousands of Pound Sterling).

Years	Tops	Woolen Fabrics	Worsted Goods	Carpets	Other Woolen & Worsted Goods	Total
1913	3,651.8	14,466.6	6,286.3	1,537.0	1,827.8	27,769.5
1920	5,036.6	75,166.3	26,883.1	4,530.2	6,401.2	117,817.4
1921	4,401.7	24,632.5	11,227.7	3,227.9	3,035.9	46,525.7
1922	4,424.9	25,056.5	11,773.4	2,845.6	2,699.5	45,799.9
1923	5,264.0	28,280.9	11,399.6	3,322.5	3,683.5	51,950.5
1924	6,465.2	30,141.7	10,055.5	3,397.2	4,279.0	54,338.6
1925	5,313.6	26,247.4	9,029.4	3,104.3	3,394.1	47,088.8
1926	4,735.4	23,624.4	8,120.7	3,063.4	3,250.8	42,794.7
1927	5,648.9	25,741.1	7,334.3	2,958.2	3,401.8	45,084.5
1928	4,807.6	25,528.4	8,438.2	2,888.4	3,359.4	45,022.0
1929	4,208.4	22,206.9	9,423.5	2,904.7	3,107.6	41,851.1
1930	2,828.2	16,041.1	6,710.5	3,014.4	3,956.1	31,550.3
1931	2,022.4	10,192.4	5,100.6	1,051.1	1,373.7	19,740.2
1932	3,077.6	8,483.4	4,406.3	1,150.9	1,176.9	18,295.1
1933	3,424.1	8,842.3	4,590.4	1,251.3	1,206.5	19,314.6

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

APPENDIX 21

EXPORTS OF WOOL TEXTILE GOODS BY THE UNITED KINGDOM
(Yarns in thousands of pounds)
(Fabrics in thousands of square yards)

	1909-1913 (average)	1924	1925	1926	1927
Wool Tops					
to Foreign Countries	36,628	33,521	25,896	25,353	--
to British Colonies	2,223	7,608	6,145	8,269	--
TOTAL	41,851	41,129	33,041	32,622	--
Woolen-Worsted Yarn					
to Foreign Countries	81,028	56,565	50,031	38,778	--
to British Colonies	5,965	9,327	7,783	8,553	--
TOTAL	86,991	65,892	57,414	47,331	--
Woolen Fabrics					
to Foreign Countries	76,417	100,314	85,851	72,576	--
to British Colonies	51,077	58,426	46,323	49,981	--
TOTAL	127,494	164,740	132,174	119,357	130,916
Worsted Fabrics					
to Foreign Countries	58,434	32,364	27,421	23,530	--
to British Colonies	39,971	24,479	19,881	19,430	--
TOTAL	98,405	56,843	47,302	42,950	39,979

SOURCE: A. Balfour, Survey of Textile Industry.

WHOLESALE PRICES a/ OF TEXTILE GOODS IN THE UNITED KINGDOM

Year	Cotton: Middlings: American	Cotton: Middlings: Egyptian	Cotton: Yarns: American	Cotton: Yarns: Egyptian	Cotton: Fabrics b/	Wool: Washed c/	Wool: Merino Tops	Wool: Worsted Yarns d/	Jute: Raw	Hemp: Raw	Linen: Yarns
	d. per pound		d. per pound		Shillings per Pound	d. per Pound	d. per Pound	Shillings per Pound	£ per Ton	£ per Ton	Sh. per 60,000 Yards
1913	7.01	No. data	10.18	18.48	10.32	15.55	29.16	3.81	30.45	31.53	4.73
1920	23.17	16.29	47.50	97.27	49.86	55.86	109.10	15.32	56.25	65.67	39.45
1921	9.39	18.90	17.60	33.25	22.29	21.32	42.38	5.24	31.91	40.48	17.65
1922	12.32	18.14	18.22	29.47	21.26	20.23	54.73	6.23	31.17	33.37	13.21
1923	16.49	18.13	22.86	30.98	22.76	24.96	60.18	6.57	27.36	33.30	10.35
1924	16.30	24.19	25.73	37.08	24.07	32.61	72.20	7.27	31.59	43.80	12.04
1925	12.71	29.22	20.91	39.61	21.27	27.02	54.86	6.17	48.12	46.21	11.00
1926	9.26	16.30	15.23	29.08	17.15	21.45	47.19	5.51	40.56	43.05	7.96
1927	9.50	16,78	15.32	27.28	17.35	23.79	48.52	5.48	31.44	43.38	8.29
1928	10.93	19.24	16.24	28.45	17.87	23.51	51.56	5.74	32.76	37.70	8.96
1929	10.29	17.05	15.32	25.28	17.18	24.43	39.02	4.74	30.98	37.13	8.14
1930	7.47	12.03	11.37	19.80	14.82	16.28	26.57	3.63	21.37	26.45	7.25
1931	5.10	7.82	8.94	15.45	12.11	12.38	23.04	3.16	17.04	18.78	5.50
1932	5.25	7.25	8.95	15.09	11.63	10.72	22.14	3.03	16.94	18.74	5.87
1933	5.55	7.55	9.15	15.17	11.55	11.24	28.37	3.45	15.65	15.83	5.88

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

a/ Compiled by the Board of Trade.
b/ Fabrics, 36" shirting, 40 yard piece, 12 pounds.
c/ Washed 36-38's.
d/ Grey yarn.

APPENDIX 23

INDICES OF WHOLESALE PRICES OF TEXTILE GOODS IN THE UNITED KINGDOM 1/
1913=100

Years	Cotton 16 Items Included	Other Textiles 15 Items Included
1913	100.0	100.0
1920	480.2	358.9
1921	192.3	171.6
1922	182.2	165.5
1923	201.9	171.1
1924	227.8	195.8
1925	209.8	186.4
1926	158.3	160.4
1927	154.7	156.4
1928	164.2	164.9
1929	154.4	151.0
1930	121.2	113.6
1931	96.8	91.6
1932	95.8	85.6
1933	96.2	88.5

SOURCE: Statistical Abstracts for the United Kingdom, London, 1935.

1/ Compiled by British Board of Trade.

APPENDIX 24

WHOLESALE PRICE INDICES OF COTTON GOODS

IN GREAT BRITAIN, FRANCE AND GERMANY

1926=100

YEARS	GREAT BRITAIN 1/	FRANCE Cotton Yarns	GERMANY Cotton Yarns
1913	63.2	-	64.6
1920	303.3	-	-
1921	121.5	-	-
1922	115.1	-	-
1923	127.5	-	-
1924	143.9	-	153.4
1925	132.5	-	141.5
1926	100.0	100.0	100.0
1927	97.7	71.8	101.8
1928	103.7	76.6	105.8
1929	97.5	74.4	100.4
1930	76.6	62.8	80.9
1931	61.1	44.0	56.3
1932	60.5	34.2	45.5
1933	60.8	35.5	48.0

1/ The indices compiled by the British Board of Trade. 16 items of cotton goods included.

SOURCE: 1. Statistical Abstracts for the United Kingdom. 1935 p. 222

2. Annuaire Statistique. 1934. p. 143

3. Vierteljahrshefte zur Statistik des deutschen Reichs. 1925-1934

II. TEXTILE INDUSTRY IN FRANCE

A. Textile Industry in General Economic System of France.

1. The Textile Industry occupies the predominant position both in the internal economy and in the foreign trade of France. Its outstanding place in the general economic structure of the country is evidenced by:

(a) Its volume of production, which amounts in value to 33.4 per cent of all the industrial production of France (Textile Weekly, September 1, 1933).

(b) Its volume of employment - In 1926 (the most recent available Census of Industries) the textile trades employed 932,853 persons out of 20,919,000, the total working population in France, or 4.5 per cent. (Out of the total number of French textile workers 378,501 or 40.6 per cent were males and 554,337 or 59.4 per cent were females).

(c) Its volume of industrial equipment - In the number of cotton spindles, (10,144,000) France ranked as the third largest textile manufacturing country in the world and in 1933 was surpassed only by Great Britain and the United States. In the number of looms (198,300) France ranked fourth among other European countries. The recovery of Alsace added considerably to the French Textile Industry (about 1,730,000 cotton spindles and 38,000 cotton looms). The Wool Industry was practically annihilated in the Great War since it was located mostly in the regions occupied by

German armies. After the War, however, it was restored and modernized. France is the first country in Europe in Silk manufacturing and is far ahead of four other important silk manufacturing European countries - Germany, Italy, Switzerland and Czechoslovakia. Thus, in 1926 the number of looms in the silk weaving sections was 55,000 in France, 47,000 in Germany, 38,000 in Italy, 15,000 in Zwitzerland and 14,000 in Czechoslavakia. (Annuaire Statistique, 1933)

(d) Its role in the foreign trade of France - Textiles averaged 21.0 per cent of the total value of all imports for the first quarter of each year during 1929 to 1933 and 19.3 per cent of the value of the total French exports for the same period. For the same period, the imports and exports of textile raw materials were respectively 34.2 per cent and 19.4 per cent of the imports and exports of all raw materials. Yarns and fabrics consributed 10.2 per cent of total value of all imported semi-finished and finished manufactured goods and 33.2 per cent of all exported French manufactured goods (Appendices 1-4).

B. Organization of the French Textile Industry

1. The French Textile Industry is highly decentralized. According to the Census of 1926 a little more than 15 per cent of the establishments employed 20 or more workers. Almost 14 per cent employed between 6 and 20, and more than 53 per cent

employed 1 to 5 workers; 18 per cent of the establishments were of the "cottage industry" type which employed no labor outside of the members of the family.

It is also highly sectionalized. At least 17 different lines of textile production are discerned by the industrial Census of 1936 (Appendix 5). Many of these lines are ffirther subdivided into stages of manufacturing and marketing; the French Textile Industry is more diffused technically and economically than that of any other industrial country of Europe, including Great Britain.

The more important separate branches of the French Textile Industry may be characterized as follows:

(a) The Cotton Industry is relatively a small scale industry in France. The average number of operatives in 1936 was 310 workers per cotton spinning mill and only 128 employees per weaving unit. The family character of the Cotton Industry remains very marked despite a continuous transformation for fiscal purposes of the legal status of firms into companies. The recovery of the highly developed Alsatian Cotton Industry subsequent to the war added about 25 per cent to French Textile Equipment and more than doubled its printing capacity.

(b) The Wool Industry in France, compared with that of Germany, the United States and Great Britain, is organized on a small scale basis and retains like the other French Textile Industries, its essentially family character. It should be noted, however, that the industrial equipment of the French Wool Textile Industry is extremely modern as a result of the replacement in 1919-1935 of the machinery destroyed during the War.

(c) The Silk Industry is next in importance, France holds the leading position in Europe in the manufacture of silk goods. Although 113,895 employees were registered in the silk and rayon, spinning and weaving divisions in France in 1936 (Annuaire Statistique,1938) the exact number of workers in the silk industry can not be ascertained, since a considerable proportion of this trade is still in the "cottage industry" stage. This situation makes it difficult to trace the progress of economic rationalization in the industry as a whole.

(d) The Rayon Industry, unlike the other textile trades in France, is highly concentrated. Two groups control the bulk of the French rayon output - the Givet-Isieux and the Carnot groups. They represent about 90 per cent of the national viscose capacity. The Rayon Industry is participating in the international rayon cartel and mainly because

of that, the out-put of rayon has been relatively stable in France in the last few years. Since 1930, however, the Rayon Industry's position has been complicated by the instability of cotton and wool prices.

(e) The Linen Industry, with 24,973 operatives employed in flax preparation and spinning and 56,503 operatives in linen weaving, was in 1926 one of the most important branches of the French Textile Industry. However, since 1931 the French home market for linen goods has suffered from competition with the cheaper fabrics and from the withdrawal of foreign visitors and foreign residents, who were very large buyers of the fine linen products. The scale of undertakings in the linen trade is not very large, though concentration has developed to some extent.

(f) Jute production in France in comparison with the Scottish or Indian Jute Industries is small but has made considerable progress. The size of the units in this branch is relatively large compared with other textile industries of the country.

2. Labor organizations in the French Textile Industry are in the initial stages. Less than 15 per cent of the workers in the Industry pay dues to trade unions.

3. The normal working week of 48 hours was introduced in the French Textile Industry by the Act of April 23, 1919. The

Act also contains very detailed provisions on the regulation of hours of work in the Industry. The decree of January 16, 1933 restricted the facilities for making up the lost time. The order of December 27, 1933 abolished overtime to meet an exceptional pressure of work. There are no data available on the shift-system in use in the French Textile Industry.

4. The trend toward cartilization of Industry began relatively late in comparison with the neighboring countries and made but little progress until 1924. Only the coal, iron and tube industries were cartelized in France before the war. This was due largely to the lack of concentration in most French Industries, to the great diversity of business units and to the survival of a large number of the "cottage plants"-- particularly in the Textile Industry. Cooperative activities have made little headway among French industrialists. The French cartels, "Comptoirs", generally represent a very loose organization and the great majority of them are highly unstable, ineffective and short lived.

Within the Textile Industry some regional cartel-like agreements were achieved under the pressure of the current depression. The most notable among them is the cartel of the cotton spinners in Alsace. The discussions held in the various geographical regions of the French Cotton Spinning Industry proposed that the regional agreements should be combined into a national agreement to regulate production in its relation to demand. About 80 per cent of the

cotton spinners were said to be in favor of the plan in 1934. An arrangement on similar lines was regarded as urgently necessary for the cotton weaving branches and a plan was formulated to invoke the aid of the State to make agreements in cotton spinning more effective by means of a special 20 per cent ad valorem tax on raw cotton consumed by the firms which refused to join the national cartel, while all the members of the cartel were to be exempted from the tax. The Cartel Law of February 1935 prescribes that wherever two-thirds of the companies who control 75 per cent of the output agree to the limitation of production, such an agreement may be legalized by the Minister of Commerce. A cardinal feature of this law is that once the cartel has come into being, its restrictions and rules become compulsory for all the members of the Industry. Under the specific conditions of the French Textile Industry as it exists today a cartelization of the entire Industry seems to be impossible unless strong governmental pressure is used. The finishing branches of the Textile Industry--as is the case in other industrial countries-- are better organized.

C. Government and Industry Measures Relating to Textile Industry in France.

Among the governmental measures relating to the Textile Industry in France the following deserve to be mentioned:

1. The restrictions of imports by the tariffs, which has been a feature common to all European countries in post-war years.

2. The restrictions of imports by quotas. By a decree in April 1932, the importations of cotton yarns and piece goods for example, were subject to the quota system according to which the imports from the countries concerned were limited on a monthly basis to one-twelfth of their respective imports in 1931. In January, 1934, these quotas were reduced 75 per cent, for several classes of goods but in certain cases were shortly thereafter restored to the 1932 basis. Quotas on imports of cotton goods were also introduced in all the French colonies (Textile Weekly, August 10, 1934).

3. In addition to the reciprocal trade agreements, the government also used other measures to stimulate the exports of textile goods such as government credit to the exporting cartels of the French textile manufacturers; thus, in 1924 the "Comptoir Cotoniere Francaise", composed of 54 producers and finishers of the exportable cotton goods, received a state loan of five million francs.

4. The French Rayon Industry is in a unique position among the textile industries, since two groups (Givet-Isieux and Carnot groups) control the bulk of French rayon output and the Industry is connected with the international rayon cartel. Although French domestic consumption of rayon has decreased slightly in the years of the depression, its production has changed little and exports have even increased slightly in the last five years - from 7,937

metric tons in 1930 to 8,717 metric tons in 1934 (International Cotton Bulletin, April 1935).

5. Among the measures intended to adjust production to demand in the domestic market very few effective steps may be recorded. The maladjustment of production and demand is due to a lack of organization among the textile manufacturers, to the extreme decentralization of the industry and to the precarious character of the industrial associations and agreements. However, in addition to the strictly controlled and integrated rayon branch, organized curtailment of production was successfully achieved by the Alsatian cartel of cotton spinners through restricting the number of hours in Alsace in 1934 to 40 hours per week. In a number of mills the work week was further reduced to 32 hours. Generally, however, no other effective agreements of importance have been made in the French Textile Industry.

6. The French raw silk production has suffered particularly from the depressing forces of the economic crisis, since average prices for raw silk, which were 435 francs in 1926 and 255 in 1929, dropped to 175, 125 and 90 francs respectively, in the years from 1930 to 1932. In order to relieve the disastrous conditions in raw silk production, the government paid a bounty in 1930, 1931 and 1932 to silk producers, hoping thus to arrest the sharp fall of raw silk prices.

VALUE OF EXPORTS FROM FRANCE; 1928 to 1935 1/

(In millions of francs)

Groups of Goods	1935	1934	1933	1932	1931	1930	1929	1928
Textile Goods								
Raw Materials 2/	217.2	316.3	179.8	217.2	309.3	505.1	700.2	766.1
Yarns 2/	209.2	237.2	233.7	264.1	398.5	648.8	634.0	956.8
Fabrics 2/	370.4	500.8	558.6	627.0	1,362.5	1,922.1	2,050.6	2,089.7
Total Textiles	796.8	1,054.3	972.1	1,108.3	2,070.3	3,076.0	3,384.8	3,812.6
Foods (Total)	623.0	631.4	584.1	768.1	1,017.3	1,602.3	1,421.5	1,594.0
Raw Materials (Total)	1,132.0	1,320.5	1,113.0	1,278.3	2,024.1	2,758.6	3,120.6	3,356.3
Manufactured Products (Total)	2,303.4	2,651.5	2,861.1	3,246.3	5,352.8	7,325.1	7,443.0	7,860.7
Grand Total	4,058.4	4,513.4	4,556.2	5,292.7	8,397.2	11,686.0	11,985.1	12,761.0

Source: Statistique Mensuelle du Commerce Exterieur de la France, March 1935, p.53.

1/ Value of exports in first three months of each year.

2/ Textile raw materials included in Total Raw Materials. Yarns and Fabrics included in Manufactured Products (Total).

VALUE OF FRENCH IMPORTS: 1928 to 1935 1/

APPENDIX 2.

(In Millions of Francs)

	1935	1934	1933	1932	1931	1930	1929	1928
Total Textiles	896.5	1,232.8	1,294.2	887.5	2,025.4	3,412.2	4,607.6	4,164.2
Textile yarns - fabrics	77.3	100.9	110.0	136.7	281.0	365.4	261.2	210.8
Yarns	20.5	30.6	24.3	24.2	52.0	87.5	72.4	71.1
Fabrics	56.8	70.3	85.7	112.5	229.0	277.9	188.8	139.7
Textile Raw Materials	819.2	1,131.9	1,184.2	750.5	1,744.4	3,046.8	4,346.4	3,953.4
Wool	358.4	573.7	516.0	376.6	598.6	1,333.6	1,938.3	1,845.4
Cotton	273.0	379.4	466.9	226.0	687.6	1,203.6	1,428.6	1,163.2
Others	187.8	178.8	201.3	147.9	458.2	509.6	979.5	944.8
Foods (Total)	1,620.0	2,019.0	2,670.8	2,463.3	3,392.2	2,596.2	3,511.0	2,892.8
Raw Materials (Total)	2,858.1	3,464.7	3,775.4	3,279.8	5,931.6	8,456.9	9,515.2	8,388.6
Semi-and Manufactured Goods	932.0	1,168.8	1,365.6	1,613.1	2,483.4	2,953.4	2,214.0	1,674.2
Grand Total	5,410.0	6,652.5	7,811.8	7,356.2	11,807.2	14,006.5	15,240.2	12,955.6

SOURCE: Statistique Mensuelle du Commerce Exterieur de la France, March 1935, p. 35.

1/ Value of Imports in First Three Months of Each Year.

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RELATIVE IMPORTANCE OF RAW MATERIALS, SEMI-FINISHED AND FINISHED TEXTILE GOODS IN FRENCH TEXTILE IMPORTS AND EXPORTS

IMPORTS

Goods	1935	1934	1933	1932	1931	1930	1929	1928
Textile Raw Material	91.4	91.8	91.5	84.6	86.1	89.3	94.3	94.9
Yarns	2.3	2.4	1.9	2.7	2.6	2.5	1.6	1.7
Fabrics	6.3	5.8	6.6	12.7	11.3	9.2	4.1	3.4
Total Textile Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

EXPORTS

Goods	1935	1934	1933	1932	1931	1930	1929	1928
Raw Textile Goods	27.3	30.0	18.6	19.6	15.0	16.4	20.7	20.1
Yarns	26.2	22.5	23.9	23.8	19.1	21.1	18.7	25.1
Fabrics	46.5	47.5	57.5	56.6	65.9	62.5	60.6	54.8
Total Textile Exports	100. 0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCE: Computed from Statistique Mensuelle du Commerce Exterieur de la France, March 1935.

APPENDIX 4

ESTABLISHMENTS IN THE FRENCH TEXTILE INDUSTRY
CLASSIFIED BY NUMBER OF WORKERS EMPLOYED, 1936

Size of Units by Number of Employees	Number of		Cumulative Percentage of Total	
	Establishments	Employees	Establishments	Employees
0 1/	5,307	-	18.0	0.0
1 - 5	17,594	31,182	71.2	3.7
6 - 10	2,370	18,286	78.4	5.9
11 - 20	2,101	31,169	84.8	9.7
21 - 100	3,046	153,468	94.9	28.1
101 - 200	825	124,783	97.6	43.0
201 - 500	630	210,649	99.7	68.3
500 and more	280	264,222	100.0	100.0
Total Number	33,184	833,809		

SOURCE: Annuaire Statistique, 1938

1/ The "Cottage Industry" (Family) in which no hired labor is employed

APPENDIX 3

NUMBER EMPLOYED IN FRENCH TEXTILE INDUSTRY CLASSIFIED BY VARIOUS BRANCHES, 1926

Branches	Total	Per-cent of Total	Males	Per-cent of Total	Females	Per-cent of Total
TOTAL	913,858	100.0	378,501	100.0	534,357	100.0
Cotton Spinning and Weaving	196,396	100.0	76,666	38.9	119,730	61.1
Silk and Rayon Spinning and Weaving	113,895	100.0	36,579	32.5	76,316	67.5
Hosiery	101,444	100.0	28,217	27.5	73.227	72.5
Wool Spinning and Weaving	85,697	100.0	45,159	53.9	40,538	47.1
Finishing Trades	65,548	100.0	47,919	73.3	17,629	26.7
Linen Weaving, Table Cloths, Handkerchiefs	58,373	100.0	30,827	52.5	27,546	47.5
Cloth	58,096	100.0	29,044	50.0	29,052	50.0
Hand Embroideries	52,570	100.0	1,945	4.5	50,625	95.5
Ribbons, Caps, Cords	46,344	100.0	14,146	30.0	32,198	70.0
Machine Made Laces	33,885	100.0	15,701	46.6	18,184	53.4
Preparation & Spinning of Linen, Jute, etc.	31,059	100.0	11,945	38.4	19,114	61.6
Rugs, Draperies, etc.	22,602	100.0	12,544	56.3	10,058	43.7
Handmade Laces	15,832	100.0	319	2.0	15,513	98.0
Ropes, Nets, etc.	15,511	100.0	9,046	59.6	6,465	40.4
Machine Made Embroideries	11,922	100.0	4,506	38.2	7,416	61.8
Velvet, Plush, etc.	5,181	100.0	2,644	51.0	2,537	49.0
Spinning and Weaving not Specified	19,503	100.0	11,294	58.9	8,209	41.1

SOURCE: Annuaire Statistique, 1933

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APPENDIX 6

1/

WHOLESALE PRICES OF FRENCH TEXTILE GOODS

(In francs)

Goods	1913	1926	1927	1928	1929	1930	1931	1932	1933
Combed Wool, per kg.	6.29	61.31	56.33	57.31	45.42	28.89	21.90	18.00	21.06
American Cotton Yarn, per kg.	2.44	25.52	18.33	19.58	19.06	16.04	11.25	8.73	9.06
Cotton Fabrics, per sq. meter	0.33	3.35	2.31	2.38	2.45	2.08	1.43	1.27	1.37
Merino Wool Yarn, per kg.	8.09	99.90	87.05	88.35	72.50	57.33	47.94	35.31	37.13
Flax Yarns, per bundle	58.70	470.65	457.10	485.00	446.67	355.83	267.17	237.10	245.08
Hemp Yarns, per bundle	102.43	750.20	647.30	627.40	650.40	587.50	443.12	331.85	375.83
Jute Yarns, per kg.	1.10	8.45	5.85	6.78	6.55	5.04	3.70	3.08	2.88

SOURCE: Annuaire Statistique, 1933

1/ Yearly average of the twelve monthly averages

III. TEXTILE INDUSTRY IN GERMANY

A. Importance of Textile Industry in General Economic Structure of Germany

1. Textile manufacturing is an industry of long standing in Germany and was well established there even prior to the Industrial Revolution. The German Textile Industry is characterized by the same features as the British Textile Industry, such as economic individualism of manufacturers, their conservatism, and wide dispersion of plants with numerous small units resembling the family type of industrial organization. Generally speaking, economic rationalization made little headway in most branches of the German Textile Industry before the beginning of the 20th century.

2. The relative importance of the Textile Industry in the National Economy of Germany is best revealed from the following:

(a) Volume of employment - Over 9 per cent of the total industrial employment in Germany was absorbed by the Textile Industry. It ranked fifth among all the industries - being exceeded only by Metal (26.2 per cent), Building (12.9 per cent), Clothing (12.0 per cent) and Food (10.2 per cent). The number of textile workers in 1925 was 1,206,731 of which 689,594 or 57.0 per cent were females. (Statistik des deutschen Reichs. B. 402 S. 220).

(b) Volume of industrial equipment - With over 10,456,000 (average number for 1930-1933) cotton spindles and 2,489,000 wool spindles, Germany ranks as the third (after Great Britain and the United States) largest textile producing country in the world. (International Cotton Bulletin, 1930-1933).

B. Role of Textile Industry in Foreign Trade of Germany

1. The share of the Textile Industry in the German foreign trade is significant. The value of textiles imported amounted in 1933 to 20.4 per cent (20.7 per cent in 1928) of the total value of all German imports; the Textile Industry was second only to the Food Group and far ahead of each of the other manufactured products on the list of German imports. Ten and two-tenths per cent of total German exports in 1933 were textile goods and the industry holds third place among all German exporting industries, ranking second only to the Metal (35.6 per cent in 1933) and the Chemical (17.2 per cent in 1933) Industries. (Appendix 1).

2. Cotton and wool manufacturing are most important - Among all the German textile industries, these two contribute about four-fifths of the total value of textile imports and over two-thirds of textile exports. (Statistische Jahrbuch fur das deutsche Reich, 1933).

3. Germany is highly dependent on foreign sources for textile raw materials - About 45 per cent of the raw materials used in all branches of German industries are imported from abroad. The textile industry in this respect ranks first among all German industries by importing 90 per cent of all raw materials. (Wirtschaftsdienst, July 29, 1934). Raw materials contributed 77.3 per cent of the total value of textile imports in 1932, while yarns represented 16.1 per cent and fabrics 6.6 per cent.

4. The largest share of German textile exports consists of finished textile goods which represented 63.5 per cent of the total value of textile exports in 1932 (appendix 2), while the yarns were 18.4 per cent and raw materials amounted to 18.1 per cent.

C. Organization of German Textile Industry

1. Though there were numerous cartels and cartel-like associations and agreements among the German textile manufacturers before the advent of the National Socialistic Government, the German Textile Industry as a whole was not effectively organized. Two highly integrated branches - rayon and jute- were however completely cartel-controlled.

2. The lack of successful cartellization of the German Textile Industry has been mainly due to a diversity of business units within the Industry and to a relatively large number of small-scale establishments, which resemble in their structure, the

family type of enterprise. About one-fourth of the total number of operatives in the German Textile Industry were working in business units employing less than 50 persons each and 11.4 per cent (138,556 persons) were employed in business units with less than 5 wage earners per unit.

3. Under the National Socialistic regime a complete reconstruction of German Industry has taken place involving both sweeping organizational change and the creation of a new business code. The purpose of such reconstruction - according to official declarations - was to do away with the over-complexity of Industry and replace it with an all-embracing, rigid and unitary organization of the various business associations. Thus certain organizations were designated as the sole representatives of entire branches of the Industry. Some new organizations were created, others merged or dissolved. The Government assumed the power to dictate or change the by-laws of associations, appoint or remove their leaders, force individual outsiders to join associations and submit to their regulations. Severe punishments were provided for violation of government orders. The textile, leather and clothing industries were combined into one of twelve industrial groups covering all the stages of economic activities in Germany.

4. Hours of work in the German Textile Industry, according to the agreement signed on January 22, 1919, by the National Employers' and Workers' Organizations, were limited to 46 per week for all manual workers and salaried groups. In 1923, due to a serious economic and financial crisis, it was found necessary to make the 8-hour day rule more flexible and by the Order of December 21, 1923, extension of hours of work by collective agreement or by decision of the authorities was allowed up to a maximum of 10 hours per day. Under the National Socialistic Government the collective agreement principle was abandoned and collective regulations were substituted. Thus, the Order of July 19, 1934 decreed that working hours in certain branches of the Textile Industry might not exceed 36 hours unless there were special and exceptional reasons, such as carrying out orders for exports. In the Wool Industry, due to a shortage of available supplies or raw materials, the maximum working time has been fixed at 30 hours per week since 1934.

5. Tendency to introduce the multiple-shift system in the German Textile Industry in post-war years seemed to have been slight, although there is no statistical evidence available as to the extent of this trend. Under the present regime, double shifts are limited by a decree of August 6, 1934, to plants which obtain from the Government special permission to operate extra shifts.

D. Government and Industry Measures Relating to the Textile Industry

1. Before the advent of the National Socialistic Government - despite a considerable number of cartels and far-reaching industrial integration in single branches of textile production (jute and rayon) - the German Industry was, in most of its branches, primarily competitive. The associations, composed of a heterogeneous membership and representing in most cases sectional rather than national groups, were as a rule inefficient, unstable and short-lived. This state of affairs is particularly instructive when one considers that Germany is considered the classical country of industrial cartelization.

2. Under the present regime, the Textile Industry like nearly every other branch of German economic life has been taken under the strict and complete control of the State (Special decree, July 19, 1934).

3. Germany in recent years has suffered from an adverse trade balance, hence sharp restriction of the imports of raw textile materials was deemed necessary and was embodied in a decree by the Government in 1934.

4. Since Germany always had been greatly dependent on imported raw materials for its Textile Industry, she was now forced to solve the problem of textile raw materials by the introduction of substitutes, particularly in the cotton and wool branches. These attempts are, however, still in the experimental stage and the substitutes available are far inferior in quality to the natural textile raw materials. However, in August 1934, an admixture of

textile substitutes was decreed obligatory by the Government on all textile manufacturers. The control of purchases of textile materials is also extended over the semi-finished goods. After October 13, 1934, the purchase of cotton yarns for example whether German or foreign spun were subject to so-called "purchase permits". Even those concerns which spin and also weave are not allowed to make deliveries to their weaving sections without such permits.

5. Among the measures intended to adjust production to demand and to combat unemployment in the Textile Industry were the following decrees issued by the Government:

(a) Hoursof work were limited to 36 hours per week (Order July 19, 1934). In some cases (wool branch) a maximum of 30 hours per week was prescribed in case of a shortage of raw materials. (Refer to C-4).

(b) Operations on a double-shift basis are controlled and limited. (Refer to C-5).

(c) The dismissal of workers is taken under governmental control and was prohibited for four weeks after the decree of August 6, 1934, unless the number of shifts was decreased under the law.

(d) Construction of new plants and enlarging of existing factories is allowed by special governmental permissions only.

(e) Organization of new mail order firms is prohibited after July 1934.

(f) Female employees must be replaced wherever possible by male workers in the interest of equitable distribution of the available volume of employment. (Decision of the Board of Federation of Employers, October 1933).

(g) Overtime work, for the same reasons, is reduced to the lowest possible level.

6. Strict control of prices provided by the Government - The Ministry of National Economy issued a decree, late in 1933, to the effect that neither wage nor price increases on the home market are to be permitted. It was thought that the raising of prices would nullify the measures taken by the government to create work and to bring about economic stabilization. The Ministry of National Economy has the power to enforce its instructions. In the case of violations of the rules by the cartels, the Minister has authority to order their dissolution. A later adaptation of domestic prices to the world market was anticipated by the Government.

7. The exportation of used textile machines is actually prohibited by high taxes.

8. In the highly integrated and successfully cartelized German jute industry, the Federation of Jute Manufacturers was formed August 1933 and provided for restrictions of output in jute

spinning and weaving plants, viz., up to 30 per cent for the large units, 20 per cent for the medium sized units and 10 per cent for the small establishments. These measures have been strengthened by the decree of the Minister of National Economy prohibiting:

(a) New factories being established for the manufacture of jute yarns and fabrics.

(b) Any increase in the number of jute spindles and looms in existing undertakings.

(c) Any change over from the manufacture of jute yarns or fabrics to the manufacture of yarns and fabrics of other fibres.

Any violationsof the decree are liable to fines of an unlimited amount.

APPENDIX I

VALUE OF GERMAN FOREIGN TRADE; 1928 and 1933

(Value in Millions of Rent Marks)

Products	Value of Imports 1928	Value of Imports 1933	Value of Exports 1928	Value of Exports 1933	Percent of Total Imports 1928	Percent of Total Imports 1933	Percent of Total Exports 1928	Percent of Total Exports 1933
TOTAL	14,051.3	4,204	12,054.8	4,871.4	100.0	100.0	100.0	100.0
Textiles								
a. Textiles	2,856	848	1,724	496	20.3	20.1	14.3	10.2
b. Clothings Goods	53	9	302	140	0.4	0.3	2.5	3.1
Leather, Skins	949	271	845	249	6.8	6.4	7.0	5.1
Iron and Metals	1,782	560	3,914	1,736	12.7	13.3	32.5	35.6
Chemicals	866	356	1,677	839	6.2	8.5	13.9	17.2
Cellulose and Paper	169	83.3	492	217	1.2	2.0	4.1	4.5
Coal	189	88	746	317	1.3	2.1	6.2	6.5
Building	860	174	1,054	453	6.1	4.1	8.7	9.3
Foods	5,643	1,597	734	187	40.2	38.0	6.1	3.8
Unclassified Products	685	218	566	237	4.8	5.2	4.7	4.9

SOURCE: Vierteljahrshefte zur Statistik des deutschen Reichs, 1934 H.I.S. 151-152

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APPENDIX 2

VALUE OF TEXTILE GOODS IN GERMAN FOREIGN TRADE; 1928 and 1933

(In Millions of Rent Marks)

Textile Goods	Value of Imports 1928	Value of Imports 1933	Value of Exports 1928	Value of Exports 1933	Percent of Total Imports 1928	Percent of Total Imports 1933	Percent of Total Exports 1928	Percent of Total Exports 1933
TOTAL	2,855	847	1,724	495	100.0	100.0	100.0	100.0
Raw Materials	1,890	655	417	89	66.2	77.3	24.2	18.1
Yarns	653	136	272	91	22.9	16.1	15.8	18.4
Finished Goods	311	55	1,035	314	10.9	6.6	60.0	63.5

SOURCE: Vierteljahrshefte zur Statistik des deutschen Reichs. 1934
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IV. TEXTILE INDUSTRY IN ITALY

A. Importance of the Textile Industry in the Economic Structure of Italy

The Textile Industry had been well established in Italy long before the war and in the post-war years it became an industry of outstanding importance in the general manufacturing system of the country.

1. Volume of employment - The Industry with its 10,355 establishments employed 636,687 persons in 1927 (Encyclopedia Britannica) and ranked first among all manufacturing industries of the Kingdom. This number of employees amounted to 16.0 per cent of the total number of workers in all the Italian manufacturing industries. In 1929 the Minister of Corporations reported 252,000 workers in the Italian Cotton Industry alone (107,000 in the spinning section, 137,000 in weaving and 8,000 in finishing branches) of which 71.0 per cent were females and 29.0 per cent males (L'Industria Cotoniera Italiana, 1935).

2. The outstanding capital stock of 299 cotton stock companies in Italy in 1932 amounted to ₤1,340 million lira or 2.7 per cent of the total entrepreneurial capital of all Italian industries. The total capital investment in the Italian Cotton Industry was at that time four billion lira (L'Industria Cotoniera Italiana, April 1935). It is estimated that about 10 billion lira were invested in all branches of the Italian Textile Industry.

3. The industrial equipmentof the cotton branch of the Textile Industry in Italy includes 5,330,000 spindles (1933) or

3.4 per cent of the world's spindleage and 146,500 looms or 4.7 per cent of the world's total number of cotton looms. This equipment is sufficient to supply the domestic needs for textile goods and to produce a considerable and growing exportable surplus of yarns and fabrics (Appendix 1). The wool section employed over 1,150,000 spindles and 21,000 looms in 1925 (Balfour's Report). During the post-war years there has been particularly rapid growth of rayon production and export.

B. Importance of the Textile Industry in the Foreign Trade of Italy

1. As in many other industrial countries textile goods represent the most important item of Italian foreign trade. They represent almost one quarter of the total Italian imports and approximately one third of the value of the total Italian exports (Appendix 3). The Textile Industry ranks first among all the industries in the total value of its imports and exports (Appendix and is the only industry, with the exception of the Foods Group, in which the value of exports exceeds that of imports in Italy.

2. At the turn of this century, Italy was considered a consuming country in the international textile market. She has develo her textile production to such an extent during the last three decades that she is able to produce a considerable exportable surpl especially in the cotton and rayon branches (Appendix 4). The import of yarns and fabrics practically disappeared from the Italian trade balance in the last three decades.

3. Italian exports of textile goods consist largely of yarns and fabrics while hemp is the only raw material exported from Italy (Appendix 8). Yarns represent almost one half of the total value of all exported textile goods (Appendices 7-8). Cotton, silk and rayon yarns are the leading items of the group. Among the fabrics exported from Italy, cheap cotton goods are most important. Italy, next to Japan, is considered by the Lancashire textile manufacturers as the most successful competitor of the British Textile Industry in the international market.

4. Italian textile exports are world-wide. The principal countries buying Italian fabrics are agricultural, such as Turkey, British India, Ceylon, Egypt, Eritrea, Morocco, Tripoli, Argentine, Uruguay, and the countries of the Balkan peninsula. Italian rayon yarns and fabrics are exported to agricultural and industrial countries alike. Germany, British India, China and Switzerland head the list of consumers of the Italian rayon yarns (Appendices 9-10).

5. The principal countries exporting raw cotton to Italy are the United States (68.4 per cent of total cottom imports in 1929-1934), British India (16.7 per cent for the same period) and Egypt (12.0 per cent of the total quantity of cotton imported in the last six years). (Appendix 11).

6. Italian imports of textile goods consist mainly of raw materials with raw cotton and wool leading the list. Fabrics (4.4 per cent of textiles imported in 1933) and yarns (2.6 per

cent of imports in the same year) do not play any important role in the Italian foreign trade (Appendix 6).

C. Organization of Italian Textile Industry

1. The Italian Textile Industry has made rapid progress hand in hand with the growth of the Hydroelectric Industry in Italy. This progress has been both quantitative, measured by the number of manufacturing units and the volume of production, and qualitative reflected by technical and edonomic rationalization.

2. Though the statistical evidence of the degree of economic concentration in the Italian Textile Industry is insufficient the relative concentration in different textile branches is reflected in the following table by the average number of workers per establishment calculated from a partial survey of the textile industry.

NUMBER OF ESTABLISHMENTS AND NUMBER OF WORKERS IN VARIOUS BRANCHES OF ITALIAN TEXTILE INDUSTRY - 1933

BRANCHES OF INDUSTRY	Number of Establishments	Number of Workers	Average No. of Workers per Establishment
Cotton	675	143,125	212
Wool	372	73,167	197
Silk Spinning	368	42,846	116
Silk Weaving	112	21,438	191
Linen, Hemp, Jute	163	26,418	162
Rayon	41	19,189	468
Finishing Trades	304	26,994	89
Others	433	25,533	60

SOURCE: Bolletino di Notizie Economiche, April 1935

Thus it appears that with the exception of the rayon section the textile factories in Italy are of moderate size. In addition to textile production in factories there are numerous home producing textile units in Italy; -- In the Cotton Industry alone there are about 2,000 so-called "cotton cottages" (aziende cotoniera) scattered throughout the Kin om (L'Industria Cotoniera Italiana, No. 4, 1935).

3. There is a great diversity in the size and character of the business units and establishments in the Cotton Industry (Appendix 12) since more than half of the spinning mills operate less than 20,000 spindles each and approximately half of the weaving establishments have less than 100 looms per unit. The large number of "cotton cottages" tends to increase the diversity almost to infinity.

4. The process of economic integration in the Cotton Industry may be traced by the increase in the number of stock companies and in the growth of their entrepreneurial capital. This is shown for the last three decades in the following tables.

Number of Italian Stock Companies in the Cotton Industry and Their Capital stock

Years	Number of Stock Companies	Total Stock Capital (Millions of Lira)	Reserves Per Cent Of Capital
1905	23	225	0.8
1915	102	303	6.0
1920	104	748	19.0
1923	203	1,264	17.3
1932	299	1,346	a/

a/ Data not available
SOURCE: L'Industria Cotoniera Italiana, 1935

There are relatively huge business in the Italian Cotton Industry. Seven cotton stock corporations have a capital over 30 million lira each and the largest among them is Cucirini Coats Company with capital of 72 million lira. No exact information is available as to the combinations and cartels among the Italian textile manufacturers. At present all textile units in Italy are organized in an industrial group working under strict supervision of the State.

5. Trade unionism had been well developed in Italy prior to the Fascistic regime and all essential provisions relating to labor, including normal hours of work and minimum wages, were decided by collective agreements between the trade unions and organizations of employers. The 48-hour normal week in the Textile Industry was introduced by collective bargaining in Italy long before the general legislation that came into force in 1923. As early as February 20, 1920, the Cotton and Wool Industries adopted the 48-hour week through national collective agreements and these provisions remained more or less unchanged in the national agreements, concluded subsequently. In November, 1934, however, the Confederations of Industry and Labor agreed upon 40 hours per week as a maximum with the aim of distributing the existing volume of employment among the maximum number of employees. Hourly wages remained unchanged and weekly earnings of labor have somewhat diminished; overtime work was explicitly abolished.

6. The fundamental declared principles of the Fascistic transformation of voluntary organizations of employers and employees into Syndicates and Corporations were:

(a) An abolition of strikes and lockouts and the settlement of industrial disputes by the Courts;

(b) Maximum hours of work;

(c) Living wages and

(d) The general regulation of industry.

Though originated and backed by the dictatorial government and inspired by the wise-spread enthusiasm for a new order, the Italian corporate system is essentially different from the German pattern. The fundamental idea behind the State policy in Italy is to facilitate reorganization of industry from the inside and to put its activities on the basis of self-control and self-regulation - hence, the parliamentary structure of corporations in place of the National Socialistic idea of "leadership". The cart and trusts are not prohibited in Italy, but the Corporations are created as a part of the machinery for economic rationalization on the assumption that the previously-existing monopolies misused their power to satisfy group aspirants of cartels and trade unions. This power can be safely entrusted only to groups with over-lapping interests which have been coordinated in the Corporations-free from the inherent narrowness and selfishness of any single group. Fascism's claim is that the danger of economic rationalization furthering the interests of employers against those of labor is eliminated in Italy.

7. There is not adequate information available on prices, costs, profits and loss movements in all branches of the Textile Industry in Italy, but the data on profits of large companies in t cotton branch for 1927-1933 (Appendix 13) reveal clearly the sharp recession of 1930-1932 and the conspicuous recovery of the Cotton Industry since then.

D. Government and Industry Measures Relating to Textile Industry

1. The Council of Corporations was established in Italy by the Law of March 30, 1930 as the supreme coordinating body for all the National Corporations. The wording of the Law is very general and gives the Council power to control a very wide range of problems such as the regulation of production, the control of markets, and the regulation of the relationships between the different groups.

The Textile Industry in the general framework of the corporate State may most accurately be defined as a self-controlled Industry under close State supervision. This supervision is in general hardly distinguishable from rigid regulation.

2. Among the measures affecting the foreign textile trade in Italy, there should be mentioned:

(a) Complete control and drastic restrictions of imports of all textile raw materials, yarns and fabrics . The special "institutes" (Cotton Institute, Wool Institute, etc.) are empowered to regulate, restrict or prohibit all importation of textile materials and goods and to have absolute

control (since the end of 1934) of all textile importations. All textile imports are subject to the quota fixed quarterly by the Minister of Finance and importations of textiles may be made only by firms obtaining permits from the "institute" concerned. After October 1934, for example, all importation of raw silk was prohibited in Italy.

(b) Increased tariff protection - This plan was used in Italy in 1932 to relieve the grave conditions in the hemp and linen branches.

(c) Extensive experimentations are made in Italy with the use of substitutes in place of the natural textile raw materials, in order to diminish the dependence of Italy upon other countries for raw materials. The production of the "lanital" (an artificial wool manufactured from the casein of milk) was recently started on a commerical basis and about 15 tons of lanital are produced monthly, which is said to be sufficient to clothe about 30,000 persons.

(d) Financial assistance was provided by the State to stimulate exports of many needly firms. In 1932 the "institute Mobiliare Italiano" was organized to offer a credit for Industry. Up to March 1, 1933, the demands for the capital assistance have totaled 2.8 billions of lira - of this amount the Textile Industry's applications amounted to only 129.5 million lira. The fact that such a small volume of credit

was needed by the largest industry in Italy must be regarded as a symptom indicating the healthy condition of industry in general.

(e) The bilateral trade agreements and the barter arrangements were important weapons of the State in export stimulation.

(f) The Italian Rayon Industry is working under the arrangements of the International Rayon Cartel.

3. A very comprehensive program of measures to adjust production to demand and to stabilize prices in the domestic market has been inaugurated.

(a) The national "Institutes" play a rather important role in the new organization. In the Textile Industry they are authorized:

(1) To supply business information,

(2) To regulate production,

(3) To control the terms of sales,

(4) To facilitate the supply of raw materials.

They supervise, therefore, not only foreign trade in the Textile Industry, but are also responsible for the control of domestic production and markets (Textile Weekly, August 10, 1934).

(b) The maximum hours of work in the Textile Industry Industry were reduced to 40 per week (paragraph 5 of C) and overtime work was abolished.

(c) The national minimum wage schedule was adopted to remedy grievances in regard to inequalities in internal competitio

643 (d) An equitable distribution of available work among the

cotton manufacturers was provided for in 1934 by the introduction of the quota principle in supplies of raw materials.

(e) Reduction of costs was attempted through the introduction of automatic machinery and technical reorganization of production. These measures were particularly drastic in the rayon branch.

(f) The construction of new establishments and the extension of existing mills are made subject to approval by a competent governmental agency. (Textile Weekly, November 23, 1934).

(g) An elimination of the redundant obsolete plants and machinery was brought about by scrapping - providing compensation for the owners concerned from a special fund of thirty million lira. The price payable for purchased machines could not exceed more than three times their scrap iron value. (Textile Manufacturer, May 1933).

(h) In the silk branch a decree makes it compulsory to mix raw silk with wool and cotton and the output of raw silk is regulated according to demand. The price of raw cocoons is also stabilized. Quotas are set up to control the output of silk by means of a restriction on the operations of the members of the Cocoon Breeders' Association.

(i) The national consortium of jute manufacturers was formed in 1933 (Textile Manufacturer, December 1933) to regulate production and stabilize prices. Similar price consortiums were then organized among the hemp and linen manufacturers.

(j) Rigid sale contracts were introduced in the Cotton Industry. The provisions of the textile trade agreement between the associations in the Cotton Industry and the cotton goods trade (1932) are an attempt to reconcile the trading interests of two opposing groups.

Every sales contract effected under it must specify quantity, nature, quality and price. The holding of stocks at the disposal of a buyer - or similar agreements in any form, as wellas sales with provisional prices or with prices unspecified are prohibited. Every agreement must state the agreed discount, the date of shipment and the latest date and form of payment, whether in cash or in the form of a bill of acceptance. If the latter, the accepted bill must be attached to the account and returned with the buyer's signature within 30 days at the latest.

Accounts must not be antedated or postdated. The time allowed for payment of raw materials must not exceed 90 days without cover or 120 days with cover. The corresponding period for bleached and colored goods is 120 and 180 days.

All deliveries must be made with cartage paid to factory, but delivery may be made into the buyers' premises against payment of cost.

Many other such detailed regulations of trade practices are found in the provisions of the trade agreements regarding sales contracts.

APPENDIX A

PRODUCTION AND CONSUMPTION OF COTTON YARNS IN ITALY

(In thousands of quintals)

Years	Average Production	Average Consumption 1/
1901-1910	1504	1419
1911-1920	1747	1591
1921-1930	1315	1607
1931-1934	1695	1423

Source: L'Idustria Cotoniera Italiana, April, 1935

1/ Production plus imports minus exports equals consumption

CONSUMPTION OF COTTON FABRICS IN ITALY; 1929-1933

(In Thousands of quintals)

Years	Consumption 1/
1926-1929 av.	1,294
1930	1,111
1931	916
1932	1,071
1933	1,408

SOURCE: L'Idustria Contoniera Italiana - 1935.

1/ Production plus imports minus exports equals consumption.

APPENDIX I

NUMBER OF SPINDLES AND LOOMS IN ITALIAN COTTON INDUSTRY

Year	Number		Indices 1925-100	
	Spindles	Looms	Spindles	Looms
1876	745,000	27,000	15.2	19.4
1896	--	65,000	--	--
1898	1,910,000	--	39.0	46.7
1900	2,111,000	70,000	43.1	50.3
1903	2,933,000	78,000	59,9	56.1
1908	3,928,000	30,000	81.1	60.8
1912	4,582,000	115,000	93.3	82.7
1914	4,620,000	--	94.4	--
1921	4,514,000	122,000	92.2	87.7
1923	4,620.000	--	94.4	--
1925	4,895,000	139,000	100.0	100.0
1926	---	148,000	--	106.4
1927	5,100,000	149,000	104.2	107.1
1928	5,250,000	150,000	107.2	107.8
1933	5,338,000	146,500	109.0	105.4
1934	5,490,900	148,000	112.2	106.4

SOURCE: L'Industria Cotoniera Italiana, April, 1935.

NUMBER OF SPINDELS AND LOOMS IN ITALIAN WOOL INDUSTRY

Years	Number of Spindles			Number of Power Looms
	Woolen	Worsted	Total	
1894	251,323	94,228	345,550	6,507
1907	230,000	259,796	489,796	10,567
1913	520,795	377,538	898,333	17,029
1923	550,000	500,000	1,050,000	18,000
1925	600,000	550,000	1,150,000	21,000

SOURCE: Balfour Report. Survey of Textile Industry. 1928

APPENDIX 3

RELATIVE IMPORTANCE OF VALUE OF TEXTILE GOODS IN FOREIGN TRADE OF PRINCIPAL COUNTRIES

	b/ 1/ England av. 1920-33	2/ Germany 1933	b/ 3/ France av. 1928-35	4/ Italy 1933	5/ Czechoslavakia 1931	6/ Japan 1933	7/ China 1933
IMPORTS:							
Textile Goods	17.1	20.4	21.0	23.9	23.3	47.6	16.6
All Other Goods	82.9	79.6	79.0	76.1	76.7	52.4	83.4
TOTAL IMPORTS:	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EXPORTS:							
Textile Goods	36.5	13.3 a/	19.3	33.1	28.5	62.9	40.0
All Other Goods	63.5	86.7	80.7	66.9	71.5	37.1	60.0
TOTAL EXPORTS:	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCES: 1/ Statistical Abstracts for the U.K. 1920-1933;

2/ Vierteljahrshefte zur Statistik des deutschen Reichs 1934. H. 1. S. 151-152;

3/ Statistique Mensuelle du Commerce Exterieur de la France, III.1935;

4/ Bolletino Mensile Statistica, II, 1935;

5/ Rapports de L'Office de Statistique de la Republique Tchechoslavaque, 1932;

6/ Resumé Statistique de l'Empire du Japon, 1935;

7/ The Chinese Economic Journal, 1934.

a/ Including 3.1 per cent of cloth exported.

b/ Average for the period.

APPENDIX 4

ITALIAN FOREIGN TRADE IN COTTON GOODS, 1871-1934

(In Thousands of Quintals)

Year (Average)	IMPORTS		EXPORTS	
	Yarn	Fabrics	Yarns	Fabrics
1871-1879	101.6	113.0	0.9	2.6
1880-1889	70.6	117.7	1.9	3.7
1890-1899	14.1	41.2	25.6	50.8
1900-1909	11.9	37.8	87.6	250.8
1910-1919	8.5	43.4	159.2	409.2
1920-1924	10.9	40.7	152.4	437.4
1925-1929	11.5	20.5	198.0	547.6
1930-1934	4.8	1/	270.3	510.8

SOURCE: L'Industria Cotoniera Italiana, April, 1935.

1/ Data not available

APPENDIX 5

VALUE OF ITALIAN FOREIGN TRADE CLASSIFIED BY PRODUCTS, 1933 and 1934

(In millions of lira)

Products	IMPORT		EXPORT	
	1934	1933	1934	1933
Foods, Tobacco	1,123.0	1,107.0	1,650.7	1,958.8
2.Fruits, etc.	366.4	377.7	89.8	129.1
3.Textiles	1,667.1	1,777.1	1,759.8	1,936.2
4. Metals	1,320.8	1,239.8	588.7	697.6
5.Stones,etc	1,106.5	926.5	221.9	256.7
6.Wood, etc.	352.7	341.2	95.5	95.3
7.Chemicals	724.1	719.6	202.9	230.6
Others	1,006.6	948.9	616.0	655.8
TOTAL	7,666.6	7,431.8	5,225.3	5,990.6

SOURCE: Bolletino Mensile di Statistica del Instituto Centrale di Statistica del Regno d'Italia February, 1935.

APPENDIX 6

VALUE OF TEXTILE IMPORTS OF ITALY; 1933 and 1934

(In millions of liras)

Groups of Goods	1934 Amount	1934 Per. of Total	1933 Amount	1933 Per. of Total
I. Raw Materials				
Raw Cotton	721.3	43.3	840.1	47.8
Raw Wool	394.8	23.7	360.1	20.2
Raw Wool washed	73.6	4.4	64.1	3.6
Raw Wool combed	7.4	0.5	4.8	0.2
Jute	48.8	3.0	48.6	2.7
Cuccoons dried	6.8	0.4	5.1	0.3
Silk	37.1	2.3	25.6	1.4
Total raw materials	1,292.8	77.6	1,354.4	76.2
II. Yarns				
Linen yarns	25.6	1.5	27.9	1.6
Rayon yarns	18.0	1.1	17.8	1.0
Total yarns	43.6	2.6	45.7	2.6
III. Fabrics				
Wool fabrics	50.2	3.0	78.4	4.4
IV. Non-specified goods	280.5	16.8	298.6	16.8
Total Textile goods	1,667.1	100.0	1,777.1	100.0
Total imports	7,666.6		7,431.8	
Percent of textiles To total imports	21.8%		23.9%	

APPENDIX 7

PERCENT OF TEXTILE GOODS IN ITALIAN FOREIGN TRADE, CLASSIFIED BY PRINCIPAL COUNTRIES

	1) England 1933	2) Germany 1933	3) France 1933	4) Italy 1933	5) Czecho Slovakia	6) Japan 1933	7) China 1933
Imports							
1. Raw Materials	85.8	77.3	91.5	91.6	76.5	96.4	45.8
2. Yarns	1.5	15.1	1.9	3.1	15.4	1.7	54.2
3. Fabrics	12.7	6.6	6.6	5.3	8.1	1.9	
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Exports							
1. Raw Materials	4.6	18.1	18.6	9.3	1.7	33.4	50.1
2. Yarns	15.9	18.4	23.9	51.6	20.4	2.1	16.2
3. Fabrics	79.5	63.5	57.5	39.1	77.9	64.5	33.7
Total Exports	100.0	100.0	100.0	100.0	100.0	100.0	100.0

SOURCES: 1) Statistical Abstracts for the United Kingdom, 1933; 2) Vierteljahrshefte zur Statistik des Deutschen Reichs, 1934 H.1.S.151; 3) Statistique Mensuelle du Commerce Exterieur de la France, March 1935, p.35; 4) Bollettino Mensile di Statistica 6, 1935. Group of non-specified goods was eliminated at calculation of percentages. 5) Rapports de l' Office de Statistique de la Republique Tchecoslovaque, 1932. Data on Cotton Industry only. 6) Resume Statistique de l' Empire du Japon. 7) The Chinese Economic Journal, 1934.

APPENDIX 8

VALUE OF TEXTILE GOODS EXPORTED FROM ITALY CLASSIFIED BY KIND
1935 and 1934

(In millions of lira)

Goods	1934 Amount	1934 Per. of Total	1933 Amount	1933 Per. of Total
I. Raw Materials				
Hemp, raw and fibers	160	9.1	154.	7.8
Cotton	4	0.3	3.	0.1
Total raw materials	164	9.4	157.	7.9
II. Yarns				
Cotton Yarn	188	10.7	220	11.1
Silk	155	8.8	282	14.1
Rayon	410	23.3	353	17.9
Hemp	19	1.1	21	1.0
Total semi-finished	772	43.9	876	44.1
III. Fabrics				
Cotton Fabrics	260	14.9	347	17.5
Wool Fabrics	122	6.9	125	6.3
Silk & Mixed Silk fabrics	26	1.4	34	1.7
Rayon and mixed fabrics	128	7.2	158	8.0
Total Fabrics	536	30.4	664	33.5
IV. Non Specified Textile Goods	286	16.3	287	14.5
Total Export of Textiles	1,759	100.0	1,986	100.0
Total Export	5,222.3		5,990.5	
Percent of textiles	33.7%		33.1%	

SOURCE: Bolletino Mensile di Statistica June 1935.

APPENDIX 9

EXPORTS OF RAYON GOODS BY ITALY CLASSIFIED BY PRINCIPAL COUNTRIES, 1934

(In kilograms)

	Yarns	Percent of Total	Finished Goods	Percent of Total
TOTAL	19,215,571	100.0	2,214,155	100.0
Germany	3,860,527	20.1		
British India, Ceylon	1,909,283	9.9	125,903	5.7
China	1,395,103	7.3		
Switzerland	1,223,640	6.4	129,168	5.8
Spain	901,645	4.7		
Austria	689,464	3.6		
Argentine	627,467	3.3	53,463	2.4
England	500,234	2.6	338,921	15.3
Belgium	446,436	2.3	151,456	6.8
Czechoslovakia	431,460	2.2		
Egypt	408,800	2.1	93,257	4.2
Portugal	355,684	1.9		
Holland			364,294	16.5
Holland India			14,326	.6
France	369,756	1.9		
United States			100,247	4.5
Rumania	67,856	.4		
Other Countries	6,024,976	31.3	843,120	38.2

SOURCE: Bolletino di Statistica 6 June 1935

APPENDIX 10

PRINCIPAL COUNTRIES IMPORTING ITALIAN COTTON AND WOOLEN FABRICS, 1934

Countries	COTTON Amount	COTTON Per cent of Total	WOOL Amount	WOOL Per cent of Total
Albania	1,838	0.9	-	-
Argentine	54,832	27.3	1,684	2.4
Austria	-	-	530	.7
British India, Ceylon	2,191	1.1	35,778	50.9
Canada	-	-	135	.2
China	-	-	2,904	4.1
Egypt	27,576	13.7	2,728	3.9
Eritrea	15,338	7.6	-	-
Great Britain	1,688	0.9	2,356	3.4
Great Britain's Colonies In Africa	-	-	1,402	2.0
Greece	7,098	3.5	-	-
Hongkong	-	-	3,156	4.5
Jugoslavia	10,149	5.0	-	-
Morocco	11,258	5.6	-	-
Rumania	2,862	1.4	-	-
Tripoli	9,815	4.9	-	-
Turkey	5,289	2.6	-	-
Union of South Africa	-	-	3,891	5.5
Uruguay	5,237	2.6	-	-
Others	45,985	23.9	15,738	22.4
Total	201,206	100.0	70,302	100.0

SOURCE: Bolletino Mensile di Statistica, June, 1935

APPENDIX 11

IMPORTS OF RAW COTTON INTO ITALY, 1929-1934 CLASSIFIED BY PRINCIPAL COUNTRIES OF ORIGIN

(In thousands of quintals)

Years	United States	India	Egypt	Other Countries	Total
1929	1,662	480	240	62	2,444
1930	1,328	479	185	55	2,047
1931	1,047	365	216	77	1,705
1932	1,466	146	230	60	1,902
1933	1,649	263	255	30	2,197
1934	1,153	310	335	73	1,871
Average	1,388	341	244	60	2,033

SOURCE: Industria Cotoniera Italiana, April, 1935

APPENDIX 12

NUMBER OF ESTABLISHMENTS IN WEAVING AND SPINNING BRANCHES OF ITALIAN COTTON INDUSTRY, IN 1930; CLASSIFIED BY SIZE

Spinning			Weaving		
Number of Spindles	Number of Establishments	Cumulative Percent	Number of Looms	Number of Establishments	Cumulative Percent
10,000 and less	62	30.2	50 and less	265	31.8
10,001 - 20,000	45	52.2	51 - 100	131	47.5
20,001 - 50,000	68	85.3	101 - 200	120	61.9
50,001 -100,000	29	99.5	201 - 500	113	75.4
100,000 and over	1	100.0	501 - 700	140	92.2
-	-	-	701 1,000	36	96.5
-	-	-	1,000 and over	29	100.0
Total	205	-	Total	834	-

SOURCE: L'Industria Cotoniera Italiana, April, 1935.

APPENDIX 13

PROFIT AND LOSS OF COTTON TEXTILE COMPANIES IN ITALY
WITH CAPITAL OF MORE THAN ONE MILLION LIRA; 1927 to 1933

Years	Capital and Reserves of Stock Companies (Millions of Lira)	PROFIT AND LOSS Amount (Millions of Lira)	Per Cent of Capital
1927	1,592	Plus 103	6.5
1928	1,746	Plus 57	3.2
1929	1,792	Plus 72	4.0
1930	1,822	Minus 29	1.6
1931	1,744	Minus 103	5.8
1932	1,597	Minus 36	2.2
1933	1,538	Plus 23	1.5

SOURCES: L'Industria Cotoniera Italiana, 1935
Bolletino di Notizie Economiche, April, 1935

V. TEXTILE INDUSTRY IN JAPAN

A. Importance of Textile Industry in General Economic Structure of Country.

1. Having been established originally to satisfy domestic needs, the Japanese Textile Industry began to grow in importance after 1890 under the impulse of three wars (Sino-Japanese, Russian-Japanese and World-war) and made a strikingly rapid progress in the post war period, particularly after 1931. At present the Textile Industry of Japan in the midst of world wide dislocations in the international Textile Trade appears to hold a position of undisputable competitive superiority in the textile world.

2. In no other country has the Textile Industry played such an outstanding role as it does today in the economic structure of Japan. This is evidenced by:

(a) The value of textile production which amounted to 38.8 per cent of the value of the total industrial production in 1929. Since 1909 (when textiles amounted to 49.7 per cent of total industrial production), the relative importance of textile goods in the total value of industrial output has declined considerably, due primarily to the greater expansion of the other branches of Japanese Industry. Among them may be mentioned the chemical-industry which increased the value of its output as much as 1,200 per cent, machinery - 1,600 per cent, repairing branches 3,700 per cent and the metal industry as much as 4,000 per cent,

while in the last two decades the value of textile production expanded only 770 per cent since 1909.

(b) The volume of industrial equipment which expanded uninterruptedly and on a gigantic scale (for example the number of cotton spindles increased thirty times since 1890) of which one half is sufficient to satisfy the domestic demand. In addition to the quantitative growth of the industrial equipment of textile industry in Japan, it has become technically perfect and absolutely up-to-date.

(c) The volume of employment over one-half of the total number of factory employees in Japan are found in the textile industry (53.2 per cent in 1926). The cotton and silk-cotton weaving sections alone have absorbed over thirty five per cent of the total number of factory workers in Japan.

(d) The role of Textile Industry in the foreign trade of Japan. The value of imported textile goods (mainly raw materials) averaged for the period from 1924 to 1933, thirty eight per cent of the total value of Japanese imports and the share of textile goods (largely fabrics) in the Empire's exports average sixty-five and six-tenths per cent for the same period. The relative importance of textile goods in the Japanese imports for the same decade increased 12.7 per cent while in the exports it declined about 12 per cent. The decline in the value of textile exports was absolute, due

to general contraction of international trade; and relative, due to the more rapid growth of exports in other branches of Japanese industry.

3. The cotton and silk branches are most important. In the Japanese Textile Industry, measured by the volume of employment, they represent about two-thirds of the total number of employees in the Textile Industry; in terms of value of output the Cotton and Silk Industry account for approximately four-fifths of the total value of piece goods produced in Japan.

4. The Japanese Textile Industry depends entirely on imported raw materials in all branches of textile production except raw silk of which she (Japan) is the world's largest producer and exporter.

5. Japanese textile imports consist almost exclusively of raw materials which represented ninety-six and three-tenths per cent of total value of textile imports in 1933.

6. Raw silk and textile fabrics are the principal items in Japanese textile exports. They averaged about 98 per cent of the total value of textile goods exported during 1929 to 1933.

7. The development of the rayon industry was particularly spectacular in Japan both in production and exports. While the rate of growth in the world production of rayon from 1926 to 1933 averaged 280 per cent and in no country more than 330 per cent (United Kingdom) Japan increased its rayon output 1810 per cent

during this period and ranked second only to the United States the largest producer of artificial silk among all nations.

B. Organization of the Japanese Textile Industry.

1. Contrary to the conditions prevailing in the United Kingdom and in most other industrial countries the Textile Industry in Japan is highly concentrated in all its branches.

Economic concentration in the Japanese Textile Industry has been going on rapidly in the last decade and is promoted by the growth of single business units, by the formation of combines and by the development of coordinated activities through the cartels.

2. Complete integration is the outstanding characteristic of the Japanese Textile Industry. In the rule branch it is vertically integrated in the extreme. This integration is actually inter-industrial. It covers not only the successive phases of the single manufacturing lines but extends further into the processing of raw materials, banking, shipping, insurance, transportation and marketing of finished goods. Finally the relatively few huge combines through their horizontal agreements (cartels) coordinate on a national scale the economic policies of the Textile Industry in its entirety. These cartels being the agreements of relatively few industrial giants are, in contrast to the British and other European cartels, extremely efficient and stable.

3. While the entrepreneurial forms are strongly organized,

labor in Japanese industry is notably lacking in organization. Modern trade unionism did not come into existence in Japan until shortly before the world war and is still in its initial stages. In the Textile Industry, particularly, there were in 1930 only forty-five trade unions with a total membership of 14,640 or less than 1.5 per cent of the total number of textile employees. The legal restrictions on strikes, the predominance of female employees and the temporary character of their employment in the textile mills, are probably the most important factors retarding progress of trade unionism in Japan.

4. The hours of work were not regulated by the First Factory Act of 1911 in Japan. The Act of 1926 was actually enforced in 1929, limiting the daily working hours to ten - in some branches eleven - hours per shift. In 1929, maximum hours were legally further reduced to eight and one-half hours per shift and night work was abolished. After 1930, a maximum of eight and one-half hours per shift was actually adopted by the cotton spinning and weaving sections and the ten-hour shift was introduced in the silk spinning branch.

In most sections of the Textile Industry the daily rest periods are from fifty-one minutes to one hour and the monthly rest allowances are from two to four days, since Japan has no Sunday or weekly day of rest. The overtime allowances are negligible in Japan, both as to the number of workers involved and the hours actually worked.

5. In spite of reductions in the normal daily working hours of 13/6 per cent in the cotton spinning and weaving branches and a decline of 16.7 per cent in silk spinning branches during 1923 to 1933, the average output per worker, thanks to the improved industrial equipment, increased 250 per cent in the weaving branch, 170 per cent in cotton spinning and 160 per cent in the silk spinning branches.

6. Remuneration of textile labor is low. Daily wages in 1928 to 1931 in the Textile Industry averaged 1.58 Yen for males and 0.84 Yen for females, which are lower than the general average daily earnings for Japanese factory labor for the same period (2.53 Yen for males and 0.91 Yen for females).

7. The system of two shifts which is commonly used in the East and predominates in Japan is regarded as one of the important factors in lowering the costs of production in the Japanese Textile Industry.

8. The price movements in the Japanese Textile Industry show a downward trend since 1924. Their slump during 1929-1931 was very rapid and their lowest level in 1931 in terms of indices was below that of Great Britain. The upswing of prices started earlier and was also more rapid when compared with the indices of British wholesale prices of textile goods.

9. It is of special interest from the economic angle, that in spite of high amplitude in the price fluctuations, the Japanese

Textile Industry shows an astounding resistance to the depressing influences of price disturbances. There was a sharp decline of production in 1930; but the industry as a whole expanded its production more than 40 per cent from 1931 to 1934 under generally depressed prices of this period.

C. Government and Organized Industry Measures Relating to the Textile Industry.

1. The industrial and commercial efficiency of the Japanese Textile Industry is unique, due largely to the great degree of vertical integration accompanied by the effective cartelization of the industrial magnates controlling all the vital branches of Japanese industry and trade.

2. The gigantic expansion of textile production in Japan since 1931 is due to its supreme organization which helped to meet the impoverished purchasing power of the consuming countries in the years of the depression. The industry made tremendous efforts to bring down further the costs of production by the expenditure of enormous amounts of capital in reequipment and modernization and by the mobilization of all available human energy. Thus, Japan achieved an unbeatable competitive position which explains the offensive rather than defensive character of her present economic policies both at home and in the international market.

3. Protective tariffs in Japan, with her imports consisting

almost exclusively of raw and semi-finished materials (over 95 per cent of the total value of textile imports) would be illogical. On the contrary, rigid protective measures were undertaken in 1934 by twenty-seven countries against imports of Japanese textile goods. Since the protective tariffs were found to be ineffective in many of those countries a system of quotas was adopted and directed primarily against Japanese imports. The most recent development in this field is the agreement between the governments of the United States and of Japan on the imports of textile goods to the Philippines, (October, 1935)

4. The preferential tariff policy is practically abandoned in Japan.

5. The recent trend of Japanese commercial policies is to conclude new trade agreements on the basis of reciprocity instead of using the old "most favoured nation" clause. The new commercial policy of Japan is emphasized particularly in her relations with the United States, China and British India.

6. Depreciation of Japanese currency in 1931 played an important role in the expansion of Japanese foreign trade in the years of the depression. The importance of this factor, however, is somewhat exaggerated abroad.

7. The Japanese Textile Industry suffered heavily from the Chinese Boycott of her textile goods and she in turn attempted to employ the same device in her purchases of raw cotton in British India.

8. Among the measures intended to stabilize prices that of regulating production played an exceptional and decisive role in Japan. In the Cotton Industry particularly, it was enforced mainly through the omnipotent cartel -- The Japanese Cotton Spinners Association. The first program of restriction of production was put into effect in 1890. Since 1930, there were eleven revisions of the rates of cotton yarn production curtailments. The curtailment rates in terms of percentage of capacity varied from 11.3 per cent to 54.0 per cent. The regulation of production by means of curtailment of productive capacity has been adopted in almost all Japanese Industries and in some cases the rates of curtailment are as high as 60 per cent of capacity.

9. Governmental supervision over exports of goods has been maintained in Japan in various degrees for about five decades. It was originally put in effect through the guilds of Japanese exporters. In the years of the depression this supervision was strengthened considerably by controlling the quality of goods exported, their prices, the distribution of exports among various countries, etc. Recently, the guild law was amended to give the government control over the volume and direction of the country's foreign trade in order to harmonize that trade with national interest. Exports are being controlled primarily to meet objections abroad, especially those from the United States and Great Britain.

APPENDIX 1

NUMBER OF SPINDLES AND LOOMS IN JAPANESE COTTON INDUSTRY

Year	Spindles	Looms
1881	16,204	a/
1885	65,420	a/
1890	277,895	a/
1895	580,945	a/
1900	1,267,872	a/
1905	1,426,594	a/
1910	2,099,764	a/
1913	2,414,499	24,200
1914	2,657,174	a/
1918	3,227,678	a/
1919	3,488,262	44,401
1920	3,813,580	50,583
1921	4,161,126	54,994
1922	4,517,612	60,765
1923	4,456,798	64,460
1924	5,125,696	68,579
1925	5,447,184	73,382
1926	5,697,852	77,047
1927	6,116,266	78,352
1928	6,467,713	81,201
1929	6,836,516	77,898
1930	7,214,001	79,466
1931	7,535,146	77,782
1932	7,964,850	79,277
1933	8,525,204	82,084

SOURCES: International Cotton Bulletin, 1933 (Number of Spindles in 1881-1925, number of Looms in 1913-1925); Japan's Yearbook, 1934 (Number of spindles and looms in 1926-1933).

a/ No data available.

APPENDIX 2

VALUE OF PRODUCTS IN THE VARIOUS BRANCHES
OF THE TEXTILE INDUSTRY IN JAPAN

(In millions of yen)

Year	Yarns			Fabrics						
	Cotton	Silk	Jute	Cotton	Silk Si-C.	Hemp Jute	Wool	Bleached	Dyed	Knitted
1914	203.7	5.2	2.9	-	-	-	-	-	-	-
1919	760.4	43.2	16.4	-	-	-	-	-	-	-
1920	676.5	25.4	18.8	-	-	-	-	-	-	-
1921	484.8	29.0	19.9	-	-	-	-	-	-	-
1922	537.0	32.5	17.2	639.2	525.6	29.9	136.5	5.7	93.4	-
1923	569.8	45.1	17.8	694.3	497.0	38.4	180.5	6.6	81.4	-
1924	644.9	40.1	21.5	745.8	517.3	34.6	202.4	6.4	76.1	-
1925	781.4	62.0	24.6	774.4	490.3	30.9	182.5	7.0	93.9	-
1926	660.0	63.1	17.1	743.3	494.4	23.3	205.3	9.2	89.1	55.1
1927	546.2	61.8	15.3	725.4	469.4	21.1	238.7	9.2	101.4	67.6
1928	572.4	60.0	17.6	784.6	540.7	18.7	220.4	9.3	101.2	65.8

SOURCE: The Statistics of the Department of Commerce 1928. Tokyo, 1930.

APPENDIX 3

VALUE OF TEXTILE PRODUCTS IN JAPAN

(Value in thousands of yen)

Year	Value	Percent of value of total factory products.
1909	388,002	49.7
1914	820,280	45.2
1919	3,295,900	48.9
1920	2,464,813	40.8
1921	2,336,906	42.5
1922	2,481,227	44.0
1923	2,526,778	43.3
1924	2,925,264	44.2
1925	3,215,293	45.7
1926	2,872,116	40.1
1927	2,676,689	38.8
1928	2,848,383	38.6
1929	2,997,825	38.8

SOURCE: Industrial Labor in Japan. Geneva 1933.

APPENDIX 4

PERCENT OF INCREASE IN THE VALUE OF JAPANESE INDUSTRIAL PRODUCTION
1909 to 1929

Industrial Groups	Percent Increase
Textile	773
Metal	4,059
Machines - Tools	1,663
Ceramic	880
Chemical	1,253
Woodwork	972
Printing	1,143
Foodstuff	764
Repairing	3,770
Miscellaneous	741
ALL INDUSTRIES (Average)	988

SOURCE: Industrial Labor in Japan, Geneva 1933, p. 25.

APPENDIX 5

VALUE OF JAPANESE FACTORY PRODUCTS, CLASSIFIED BY INDUSTRIES; 1929

Industries	Value of Products: In Yens	Per cent of Total
Textiles	2,997,825,000	38.8
Foodstuffs	1,124,274,000	14.5
Chemicals	1,077,608,000	13.9
Metals	689,505,000	8.9
Machines - Tools	682,162,000	8.8
Repairs of boats, machines, etc.	301,883,000	3.9
Ceramics	219,901,000	2.8
Woodwork	194,358,000	2.5
Printing	182,954,000	2.3
Gas, electrical	50,003,000	0.6
Miscellaneous	246,740,000	3.0
TOTAL	7,716,774,000	100.0

SOURCE: Industrial Labor in Japan, Geneva 1933.

APPENDIX 6

COTTON PIECE GOODS OUTPUT AND NUMBER OF OPERATIVES IN JAPAN

Year	Production of Piece Goods (000's Yards)	Daily Operatives
1907	135,253.0	10,252
1910	226,313.9	16,090
1913	416,725.4	25,254
1914	454,901.7	26,028
1915	502,076.6	26,477
1916	560,181.1	26,982
1917	594,649.4	28,767
1918	656,935.4	35,245
1919	739,390.0	44,675
1920	762,037.4	47,052
1921	700,697.9	39,200
1922	869,327,7	45,959
1923	1,000,708.9	48,511
1924	1,030,905.9	51,235
1925	1,179,524.7	55,726
1926	1,277,726.9	57,393
1927	1.294,668.8	50,527
1928	1,382,034.4	43,705
1929	1,538,349.0	43,471
1930	1,388,423.0	No data
1931	1,404,668.0	" "
1932	1,532,851.0	No Data
1933	1,673,381.0	" "
1934	1,795,345.0	" "

SOURCE: The Monthly Report on Current Economic Conditions-May 1935 (1930-1934)

Ch. K. Moser, the Cotton Industry of Far Eastern Countries-1930 (1907-1929)

APPENDIX 7

NUMBER OF SPINDLES, COTTON YARN PRODUCTION, AND AN AVERAGE NUMBER OF WORKERS PER DAY IN COTTON SPINNING INDUSTRY OF JAPAN, 1923 to 1934.

Year	Number of Spindles 1/	Cotton Yarn Produced (000's pounds)	Average Number of Workers Per Day
1923	4,079,855	106,950.4	159,970
1924	4,115,692	101,736.0	155,322
1925	4,668,253	119,794.2	173,604
1926	5,002,932	128,133.3	182,522
1927	4,831,430	124,098.0	170,197
1928	4,843,592	120,901.8	163,843
1929	5,784,070	137,913.8	159,672
1930	5,897,894	127,[illegible]66.7	139,183
1931	5,904,343	125,878.1	121,670
1932	6,307,884	137,004.0	126,805
1933	6,737,621	151,717.7	129,423
1934	7,502,004	170,262.7	141,408

SOURCE: The Monthly Report on Current Economic Conditions - May 1935 Tokyo

1/ Number of spindles in use under the production curtailment program.

APPENDIX 8

NUMBER OF EMPLOYEES IN THE TEXTILE INDUSTRY IN JAPAN

(In thousands)

Years	SPINNING			WEAVING AND FINISHING					
	Cotton	Silk	Jute, etc.	Cotton Fabrics	Silk-Cotton Fabrics	Hemp-Jute Fabrics	Woolen Fabrics	Bleached Fabrics	Dyed Fabrics
1914	112.9	5.0	2.2	a/	--	--	--	--	--
1919	187.7	16.7	10.4	--	--	--	--	--	--
1920	161.3	16.9	13.1	--	--	--	--	--	--
1921	183.3	18.7	8.6	--	--	--	--	--	--
1922	209.4	17.7	11.4	333.8	267.6	38.9	40.2	5.5	52.4
1923	182.3	26.2	8.9	335.4	262.0	43.2	47.1	5.6	56.1
1924	185.1	25.3	9.8	318.2	244.6	41.0	52.8	6.5	54.9
1925	211.0	29.0	7.5	303.3	237.1	37.2	45.6	5.1	55.1
1926	235.2	30.3	6.6	296.2	219.0	32.6	36.2	4.8	47.2
1927	180.2	29.4	7.4	288.6	217.8	27.6	40.9	5.7	59.5
1928	157.6	31.2	7.2	281.4	217.6	24.8	40.3	5.4	55.2

SOURCE: The Statistics of the Department of Commerce 1928
Tokyo 1930

a/ Data not available

APPENDIX 9

INDICES OF THE NUMBER OF COTTON SPINDLES
IN VARIOUS COUNTRIES
1913-100

Countries	1913	1930	1931	1932	1933	1934
United Kingdom	100.0	99.2	97.3	93.2	88.1	82.5
United States	100.0	108.0	103.7	100.7	98.1	98.2
France	100.0	138.5	139.9	137.0	137.0	137.4
Germany	100.0	99.0	94.7	91.5	88.1	90.4
Italy	100.0	116.1	117.1	117.0	116.0	119.4
Japan	100.0	307.5	318.0	339.1	356.6	396.3

SOURCE: International Cotton Statistics
London, March, 1935. International
Federation of Master Cotton Spinners
and Manufacturers Association.

VALUE OF TEXTILE GOODS IN JAPANESE FOREIGN TRADE, 1924 to 1933

(In millions of yen)

Years	IMPORTS				EXPORTS			
	Raw Materials	Yarn	Fabrics	Total	Raw Silk	Yarn	Fabrics	Total
1933	802.8	14.5	15.8	833.1	390.9	25.2	755.7	1,171.8
1932	552.1	5.1	14.6	571.8	383.6	21.5	437.9	843.0
1931	396.1	12.4	14.4	422.9	357.8	8.5	309.2	675.5
1930	466.4	14.1	18.4	496.7	423.2	15.0	414.9	853.1
1929	700.9	18.7	45.5	748.1	794.1	26.8	615.1	1,436.0
1928	686.0	32.1	38.6	756.7	745.2	25.9	534.3	1,305.4
1927	749.9	43.6	41.8	835.3	754.1	38.3	566.0	1,358.9
1926	836.9	32.5	35.5	904.9	750.4	70.7	589.2	1,410.3
1925	1,073.0	56.1	67.8	1196.9	910.0	123.1	598.0	1,631.1
1924	718.7	63.5	73.5	855.7	706.2	109.6	487.4	1,303.2

SOURCES: Resume Statistique de l'Empire dy Japon, 1933

Wirtschaftsdienst, March 9, 1934

HOURS PER DAY WORKED BY FULL-TIME EMPLOYEES IN VARIOUS JAPANESE INDUSTRIES

October, 1927

Industries	No. of Full-Time Employees	Average Hours of Full-Time Employees
AGGREGATE TOTAL	1,020,803	10.
Textile	697,097	10.5
a) Silk Spinning	280,949	11
b) Cotton Spinning	202,716	10
c) Cotton Weaving	63,096	10
d) Silk Weaving	35,520	10.5
e) Wool Weaving	25,021	10
f) Others	89,795	-
Ceramics	28,599	9
Metal	37,737	9
Machine and Tool	37,745	9
Chemical	37,175	9
Paper	16,260	9
Leather, bone, etc.	2,515	9
Wood and Bamboo	16,178	9
Food and Drink	43,867	9
Clothing	19,846	9
Construction	10,129	9
Printing and bookbinding	13,144	9
Artistic, etc.	4,938	9
Gas and electricity	2,231	9.5
Others	2,752	8.5

SOURCE: Industrial Labor in Japan, Geneva 1933. p. 176

APPENDIX 12

AVERAGE HOURS PER DAY AND OUTPUT PER WORKER IN THE TEXTILE INDUSTRY OF JAPAN, 1922-1932

Year	Weaving		Cotton Spinning		Silk Spinning	
	Average hours per day	Production Per worker (1000 yards)	Average hours per day	Production per worker (bales)1/	Average hours per day	Production per worker (kwan)2/
1922	11	18	11	12	12	18
1923	11	20	11	13	12	19
1924	11	20	11	13	12	22
1925	11	21	11	14	12	23
1926	11	22	11	14	12	23
July 1926	10	--	10	--	11	--
1927	10	25	10	15	11	24
1928	10	31	10	16	11	24
1929	10	35	10	17	11	24
1930	10	39	10	18	11	26
July 1930	8.5	--	8.5	--	10	--
1931	8.5	49	8.5	20	10	27
1932	8.5	50	8.5	22	10	31

SOURCE F. Maurette. Social Aspects of Industrial Development in Japan, Geneva 1934. p.26.

1/ A bale is approximately 227 kg.
2/ A kwan is 3750 grams(3.7 kg.)

APPENDIX 13

ESTIMATED NUMBER OF COTTON SPINDLES AND LOOMS
CLASSIFIED BY PRINCIPAL COUNTRIES, 1934

Country	Spindles	Per Cent of Total	Looms	Per Cent of Total
TOTAL	157,539,000	100.0	3,129,969	100.0
Great Britain	47,952,000	30.5	587,964	18.8
U. S. A.	30,969,000	19.7	613,633	19.6
France	10,170,000	6.5	198,200	6.3
Germany	9,935,000	6.3	222,500	7.1
India	9,572,000	6.1	189,678	6.1
U. S. S. R.	9,200,000	5.8	250,000	8.0
Japan	8,461,000	5.4	277,343	8.9
Italy	5,378,000	3.4	146,500	4.7
China	4,640,000	2.9	44,000	1.4
Czechoslavakia	3,668,000	2.3	104,591	3.3
Brazil	2,698,000	1.7	81,892	2.6
Belgium	2,094,000	1.3	54,800	1.7
Spain	2,070,000	1.3	66,586	2.1
Poland	1,819,000	1.2	38,611	1.2
Netherlands	1,228,000	.8	55,960	1.8
Mexico	a/	a/	33,197	1.1
Canada	1,209,000	.8	25,487	.8
Switzerland	1,206,000	.8	23,096	.7
Other Countries	5,270,000	3.3	115,931	3.8

SOURCE: International Labor Review, December, 1934, p. 763

a/ Data not available

Req. No. 9643

APPENDIX 14

WHOLESALE PRICE INDICES OF TEXTILE GOODS IN THE UNITED KINGDOM AND JAPAN
1924-100

Year	United Kingdom 1/		Japan
	Cotton Goods (16 items)	Other Textiles (15 items)	Textile Goods (9 items)
1921	84.3	87.5	97.3
1922	79.9	84.4	87.8
1923	90.0	87.3	91.0
1924	100.0	100.0	100.0
1925	92.1	95.2	88.1
1926	69.5	81.9	75.2
1927	67.9	79.9	70.0
1928	72.1	84.2	70.5
1929	67.8	77.1	68.9
1930	53.2	58.0	48.5
1931	42.5	46.8	40.5
1932	42.1	43.7	45.6
1933	42.2	45.2	55.0
1934	- -	- -	57.4

SOURCE : a) Statistical Abstracts for the United Kingdom;
b) The Monthly Report on Current Economic Conditions, Tokyo, 1935.

1/ Compiled by Board of Trade, London.

APPENDIX 15

INDICES OF WHOLE SALE PRICES AND PRODUCTION OF TEXTILE GOODS IN UNITED KINGDOM AND JAPAN; 1925-1934

1928=100

Year	Wholesale Prices		Production of Textile Goods	
	United Kingdom 1/	Japan 2/	United Kingdom	Japan
1925	128.0	125.0	. . .	. . . .
1926	99.3	106.7	. . .	106.4
1927	94.3	99.3	101.7	103.2
1928	100.0	100.0	100.0	100.0
1929	94.2	97.8	98.6	113.9
1930	73.9	68.8	79.6	103.0
1931	59.0	57.4	77.1	104.1
1932	58.4	64.7	85.2	114.6
1933	58.6	78.0	89.9	126.4
1934	. . .	81.4	93.1	141.5

1/ Prices of cotton goods (16 items) only are taken in calculation of indices.

2/ Index is calculated on basis of 9 items of textile goods for Japan.

SOURCE : 1. Statistical Abstracts for the United Kingdom.

2. The Monthly Report on Current Economic Conditions Tokyo, 1935

APPENDIX 16

INDICES OF PRODUCTION IN TEXTILE INDUSTRY CLASSIFIED BY PRINCIPAL COUNTRIES, 1926-1934

1928=100

Years	England	United States	Germany	France	Italy	Japan	Belgium	Canada	Czechoslavakia
1926	97.2	--	82.8	98.0	--	106.4	82.7	99.3	79.8
1927	105.6	101.7	108.5	89.9	--	103.2	95.4	100.2	104.8
1928	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1929	107.5	98.6	92.4	92.9	101.7	113.9	96.6	97.1	98.9
1930	85.0	79.6	90.0	85.9	91.4	103.0	78.4	73.7	89.8
1931	87.9	77.1	87.7	71.7	81.9	104.1	72.0	71.9	81.6
1932	77.6	85.2	80.0	60.6	67.4	114.6	61.3	72.9	67.2
1933	91.6	89.9	90.7	74.5	76.3	126.4	61.8	96.6	62.6
1934	79.4	92.1	98.8	63.6	73.6	141.5	46.0	110.8	75.1

SOURCE: Monthly Bulletin of Statistics, N.Y., 1935

OFFICE OF THE NATIONAL RECOVERY ADMINISTRATION
THE DIVISION OF REVIEW

THE WORK OF THE DIVISION OF REVIEW

Executive Order No. 7075, dated June 15, 1935, established the Division of Review of the National Recovery Administration. The pertinent part of the Executive Order reads thus:

> The Division of Review shall assemble, analyze, and report upon the statistical information and records of experience of the operations of the various trades and industries heretofore subject to codes of fair competition, shall study the effects of such codes upon trade, industrial and labor conditions in general, and other related matters, shall make available for the protection and promotion of the public interest an adequate review of the effects of the Administration of Title I of the National Industrial Recovery Act, and the principles and policies put into effect thereunder, and shall otherwise aid the President in carrying out his functions under the said Title.

The study sections set up in the Division of Review covered these areas: industry studies, foreign trade studies, labor studies, trade practice studies, statistical studies, legal studies, administration studies, miscellaneous studies, and the writing of code histories. The materials which were produced by these sections are indicated below.

Except for the Code Histories, all items mentioned below are scheduled to be in mimeographed form by April 1, 1936.

THE CODE HISTORIES

The Code Histories are documented accounts of the formation and administration of the codes. They contain the definition of the industry and the principal products thereof; the classes of members in the industry; the history of code formation including an account of the sponsoring organizations, the conferences, negotiations and hearings which were held, and the activities in connection with obtaining approval of the code; the history of the administration of the code, covering the organization and operation of the code authority, the difficulties encountered in administration, the extent of compliance or non-compliance, and the general success or lack of success of the code; and an analysis of the operation of code provisions dealing with wages, hours, trade practices, and other provisions. These and other matters are canvassed not only in terms of the materials to be found in the files, but also in terms of the experiences of the deputies and others concerned with code formation and administration.

The Code Histories, (including histories of certain NRA units or agencies) are not mimeographed. They are to be turned over to the Department of Commerce in typewritten form. All told, approximately eight hundred and fifty (850) histories will be completed. This number includes all of the approved codes and some of the unapproved codes. (In Work Materials No. 18, Contents of Code Histories, will be found the outline which governed the preparation of Code Histories.)

(In the case of all approved codes and also in the case of some codes not carried to final approval, there are in NRA files further materials on industries. Particularly worthy of mention are the Volumes I, II and III which constitute the material officially submitted to the President in support of the recommendation for approval of each code. These volumes

set forth the origination of the code, the sponsoring group, the evidence advanced to support the proposal, the report of the Division of Research and Planning on the industry, the recommendations of the various Advisory Boards, certain types of official correspondence, the transcript of the formal hearing, and other pertinent matter. There is also much official information relating to amendments, interpretations, exemptions, and other rulings. The materials mentioned in this paragraph were of course not a part of the work of the Division of Review.)

THE WORK MATERIALS SERIES

In the work of the Division of Review a considerable number of studies and compilations of data (other than those noted below in the Evidence Studies Series and the Statistical Materials Series) have been made. These are listed below, grouped according to the character of the material. (In Work Materials No. 17, Tentative Outlines and Summaries of Studies in Process, these materials are fully described).

Industry Studies

Automobile Industry, An Economic Survey of
Bituminous Coal Industry under Free Competition and Code Regulation, Economic Survey of
Construction Industry and NRA Construction Codes, the
Electrical Manufacturing Industry, The
Fertilizer Industry, The
Fishery Industry and the Fishery Codes
Fishermen and Fishing Craft, Earnings of
Foreign Trade under the National Industrial Recovery Act
- Part A - Competitive Position of the United States in International Trade 1927-29 through 1934.
- Part B - Section 3 (e) of NIRA and its administration.
- Part C - Imports and Importing under NRA Codes.
- Part D - Exports and Exporting under NRA Codes.

Forest Products Industries, Foreign Trade Study of the
Iron and Steel Industry, The
Knitting Industries, The
Leather and Shoe Industries, The
Lumber and Timber Products Industry, Economic Problems of the
Men's Clothing Industry, The
Millinery Industry, The
Motion Picture Industry, The
Migration of Industry, The: The Shift of Twenty-Five Needle Trades From New York State, 1926 to 1934
National Income, A study of,
Paper Industry, The
Production, Prices, Employment and Payrolls in Industry, Agriculture and Railway Transportation, January 1923, to date
Retail Trades Study, The
Rubber Industry Study, The
Statistical Background of NRA
Textile Industry in the United Kingdom, France, Germany, Italy, and Japan
Textile Yarns and Fabrics
Tobacco Industry, The
Wholesale Trades Study, The

Women's Apparel Industry, Some Aspects of the

Trade Practice Studies

Commodities, Information Concerning: A Study of NRA and Related Experiences in Control
Distribution, Manufacturers' Control of: A Study of Trade Practice Provisions in Selected NRA Codes
Design Piracy: The Problem and Its Treatment Under NRA Codes
Electrical Mfg. Industry: Price Filing Study
Fertilizer Industry: Price Filing Study
Geographical Price Relations Under Codes of Fair Competition, Control of
Minimum Price Regulation Under Codes of Fair Competition
Multiple Basing Point System in the Lime Industry: Operation of the
Price Control in the Coffee Industry
Price Filing Under NRA Codes
Production Control Under NRA Codes, Some Aspects of,
Resale Price Maintenance Legislation in the United States
Retail Price Cutting, Restriction of, with special Emphasis on The Drug Industry.
Trade Practice Rules of The Federal Trade Commission (1914-1936): A classification for comparison with Trade Practice Provisions of NRA Codes.

Labor Studies

Employment, Payrolls, Hours, and Wages in 115 Selected Code Industries 1933-1935
Hours and Wages in American Industry
Labor Program Under the National Industrial Recovery Act, The
  Part A. Introduction
  Part B. Control of Hours and Reemployment
  Part C. Control of Wages
  Part D. Control of Other Conditions of Employment
  Part E. Section 7(a) of the Recovery Act
PRA Census of Employment, June, October,1933
Puerto Rico Needlework, Homeworkers Survey

Administrative Studies

Administrative and Legal Aspects of Stays, Exemptions and Exceptions, Code Amendments, Conditional Orders of Approval
Administrative Interpretations of NRA Codes
Administrative Law and Procedure under the NIRA
Agreements Under Sections 4(a) and 7(b) of the NIRA
Approved Codes in Industry Groups, Classification of
Basic Code, the -- (Administrative Order X-61)
Code Authorities and Their Part in the Administration of the NIRA
  Part A. Introduction
  Part B. Nature, Composition and Organization of Code Authorities
  Part C. Activities of the Code Authorities
  Part D. Code Authority Finances
  Part C. Summary and Evaluation
9675.

Code Compliance Activities of the NRA
Code Making Program of the NRA in the Territories, The
Code Provisions and Related Subjects, Policy Statements Concerning
Content of NIRA Administrative Legislation
  Part A. Executive and Administrative Orders
  Part B. Labor Provisions in the Codes
  Part C. Trade Practice Provisions in the Codes
  Part D. Administrative Provisions in the Codes
  Part E. Agreements under Sections 4(a) and 7(b)
  Part F. A Type Case: The Cotton Textile Code
Labels Under NRA, A Study of
Model Code and Model Provisions for Codes, Development of
National Recovery Administration, The: A Review and Evaluation of its Organization and Activities
NRA Insignia
President's Reemployment Agreement, The
President's Reemployment Agreement, Substitutions in Connection with the
Prison Labor Problem under NRA and the Prison Compact, The
Problems of Administration in the Overlapping of Code Definitions of Industries and Trades, Multiple Code Coverage, Classifying Individual Members of Industries and Trades
Relationship of NRA to Government Contracts and Contracts Involving the Use of Government Funds
Relationship of NRA with other Federal Agencies
Relationship of NRA with States and Muncipalities
Sheltered Workshops Under NRA
Uncodified Industries: A Study of Factors Limiting the Code Making Program

Legal Studies

Anti-Trust Laws and Unfair Competition
Collective Bargaining Agreements, the Right of Individual Employees to Enforce Provisions of
ommerce Clause, Possible Federal Regulation of the Employer-Employee Relationship Under the
Delegation of Power, Certain Phases of the Principle of, with Reference to Federal Industrial Regulatory Legislation
Enforcement, Extra-Judicial Methods of
Federal Regulation through the Joint Employment of the Power of Taxation and the Spending Power
Government Contract Provisions as a Means of Establishing Proper Econ mic Standards, Legal Memorandum on Possibility of
Intrastate Activities Which so Affect Interstate Commerce as to Bring them Under the Commerce Clause, Cases on
Legislative Possibilities of the State Constitutions
Post Office and Post Road Power -- Can it be Used as a Means of Federal Industrial Regulation?
State Recovery Legislation in Aid of Federal Recovery Legislation History and Analysis
Tariff Rates to Secure Proper Standards of Wages and Hours, the Possibility of Variation in
Trade Practices and the Anti-Trust Laws
Treaty Making Power of the United States
War Power, Can it be Used as a Means of Federal Regulation of Child Labor?
9675.

THE EVIDENCE STUDIES SERIES

The Evidence Studies were originally undertaken to gather material for pending court cases. After the Schechter decision the project was continued in order to assemble data for use in connection with the studies of the Division of Review. The data are particularly concerned with the nature, size and operations of the industry; and with the relation of the industry to interstate commerce. The industries covered by the Evidence Studies account for more than one-half of the total number of workers under codes. The list of these studies follows:

Automobile Manufacturing Industry
Automotive Parts and Equipment Industry
Baking Industry
Boot and Shoe Manufacturing Industry
Bottled Soft Drink Industry
Builders' Supplies Industry
Canning Industry
Chemical Manufacturing Industry
Cigar Manufacturing Industry
Coat and Suit Industry
Construction Industry
Cotton Garment Industry
Dress Manufacturing Industry
Electrical Contracting Industry
Electrical Manufacturing Industry
Fabricated Metal Products Mfg. Industry and
Metal Finishing and Metal Coating Industry
Fishery Industry
Furniture Manufacturing Industry
General Contractors Industry
General Contractors Industry
Graphic Arts Industry
Graphic Arts Industry
Gray Iron Foundry Industry
Hosiery Industry
Infant's and Children's Wear Industry
Iron and Steel Industry
Leather Industry
Lumber and Timber Products Industry
Mason Contractors Industry
Men's Clothing Industry
Motion Picture Industry
Motor Vehicle Retailing Trade
Needlework Industry of Puerto Rico
Painting and Paperhanging Industry
Photo Engraving Industry
Plumbing Contracting Industry
Retail Lumber Industry
Retail Trade Industry
Retail Tire and Battery Trade Industry
Rubber Manufacturing Industry
Rubber Tire Manufacturing Industry
Shipbuilding Industry
Silk Textile Industry
Structural Clay Products Industry
Throwing Industry
Trucking Industry
Waste Materials Industry
Wholesale and Retail Food Industry
Waste Materials Industry
Wholesale and Retail Food Industry
Wholesale Fresh Fruit and Vegetable Industry
Wool Textile Industry

THE STATISTICAL MATERIALS SERIES

This series is supplementary to the Evidence Studies Series. The reports include data on establishments, firms, employment, payrolls, wages, hours, production capacities, shipments, sales, consumption, stocks, prices, material costs, failures, exports and imports. They also include notes on the principal qualifications that should be observed in using the data, the technical methods employed, and the applicability of the material to the study of the industries concerned. The following numbers appear in the series:
9675.

Asphalt Shingle and Roofing Industry
Business Furniture
Candy Manufacturing Industry
Carpet and Rug Industry
Cement Industry
Cleaning and Dyeing Trade
Coffee Industry
Copper and Brass Mill Products Industry
Cotton Textile Industry
Electrical Manufacturing Industry
9675.
Fertilizer Industry
Funeral Supply Industry
Glass Container Industry
Ice Manufacturing Industry
Knitted Outerwear Industry
Paint, Varnish, and Lacquer, Mfg. Industry
Plumbing Fixtures Industry
Rayon and Synthetic Yarn Producing Industry
Salt Producing Industry